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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

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SUMMARY

Civilian per capita consumption of food during this year is expected to equal and may exceed that of 1949, which was 11 percent above the prewar (1935-39) average. With normal weather, domestic food supplies are likely to be somewhat larger, and with some further decline in retail food prices in prospect, consumers may purchase more food than last year. Economic activity in the United States is expected to continue at a high level, and consumer purchasing power probably will not differ much from that in 1949.

Somewhat more livestock products will be consumed per person than last year. The small increase expected in meat consumption will be principally in pork. Declines in veal and lamb and mutton will not be enough to offset this expansion. Some minor reduction from the 1949 rate may occur in per capita civilian takings of dairy products, on a milk equivalent basis. The prospective increase in the consumption of cheese and evaporated milk is likely to be overshadowed by possible reductions in butter, ice cream, and fluid milk and cream. Consumers probably will eat more eggs and turkey in 1950, but less chicken.

Supplies of other foods will be adequate to maintain civilian consumption of these products at the 1949 rates or perhaps even exceed them in the late winter and early spring months. Civilians are expected to consume more fats and oils other than butter and shortening per person than they did last year, with most of the increase in lard. Supplies of fresh apples during the first half of the year will be larger than in 1949 while those of citrus fruits will be smaller because of reduced supplies of fresh grapefruit. Stocks of canned, frozen and dried fruits at the beginning of the year were sufficient to maintain per capita consumption of these products during the first half of 1950 at about the same level as a year earlier. Less canned citrus juices will be available than in 1949, so consumption of these juices will decline. However, more frozen orange juice will be on the market. During early 1950 consumption of fresh vegetables is expected to be somewhat larger than in the same months last year. January 1 stocks of cabbages and onions were lower than in 1949, but vegetable crops during the early part of this year are expected to be about 14 percent larger than last year. Civilians probably will continue to consume about as much grain products per person as in 1949. Sugar consumption per capita is likely to be a little higher in 1950 than in the past year.

Civilian per capita consumption of food in 1949 was practically equal to the 1948 rate. Civilians consumed more poultry, butter, cheese, apples and other deciduous fruits, and dry edible beans. On the other hand, they consumed less lamb and mutton, eggs, fluid milk and cream, evaporated milk, lard, margarine, fresh citrus fruits, canned fruit juices, fresh vegetables, potatoes, and sugar.

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A special article, "Growing Importance of Nonfat dry milk solids in the United States", p.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-48 and estimates for 1949, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948	1949 Prel. 1/	1949 as a percentage of 1948
Food grains 2/	116	148	155	164	197	190	165	87
Truck crops 3/	124	137	142	158	141	144	144	100
Fruits and nuts 4/	108	123	113	133	129	127	135	106
Vegetables, excluding truck crops 5/	125	106	110	128	107	123	115	93
Sugar crops 6/	81	81	94	103	110	89	99	111
Total food crops 7/	116	129	130	145	148	148	140	95
Meat animals 8/	149	155	147	145	145	134	136	101
Poultry 9/	162	166	170	160	157	153	163	107
Dairy products 10/	113	115	119	119	117	114	117	103
Total food livestock	140	144	142	139	138	131	135	103
Food production	134	140	139	140	140	135	136	101
Agricultural production, food and non-food	129	137	134	137	136	139	139	100
Civilian per capita food consumption	109	112	114	119	115	111	111	100

1/ Production estimates are based on the December crop report, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1949.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1949 1/

Year	Total food utilization	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Distribution: Civilian	Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.1	.1		91.4	4/ 3.5	2.1	2.2	.1		3.0
1949 Prel.	100.0	95.2	5.1		.3	91.1	4/ 3.2	2.3	1.5		.6	3.4
Section b. Percentage of 1935-39 food utilization												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.6	.6		1.6
1945	136.4	130.5	6.5		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	133.7	126.7	6.9	.1		122.2	4/ 4.7	2.8	2.9	.1		4.0
1949 Prel.	134.2	127.7	6.9		.4	122.2	4/ 4.3	3.1	2.1		1.0	4.6

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index-number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces.

RETAIL FOOD PRICES

Review of 1949

Retail food prices averaged about 4 percent less in 1949 than in 1948. The BLS index of retail prices in urban areas in 1949 was above a year earlier only for fresh fruits and vegetables, sugar and sweets, and beverages (mainly coffee). Meats (including poultry and fish) were about 5 percent lower in price than in 1948, eggs by about four percent, dairy products were nine percent less, fats and oils other than butter declined approximately a fourth, dried fruits and vegetables were down 8 percent, and canned fruits and vegetables were about 3 percent below the comparable 1948 average. The BLS index of retail prices of cereals and bakery products averaged almost the same in 1949 as in the preceding year.

The relative stability in the general level of retail food prices reflected the continued high level of consumer incomes and expenditures and little change in food supplies. Food production in 1949 was slightly larger than a year earlier, with the expansion in the production of livestock products offsetting the reduction in food crop output. Exports were a little lower than in 1948. Per capita civilian consumption of food was about the same in 1949 as in the preceding year. End of year stocks of food were somewhat larger than on January 1, 1949.

Economic activity in the United States for the year as a whole was at a very high rate. The dollar value of all goods and services produced in 1949 was only slightly less than the 1948 record of 262.4 billion dollars. Total personal income was almost the same as in 1948, when it reached the peak of 211.9 billion dollars. However, with personal income taxes a little lower in 1949, disposable personal income was up slightly in total.

Total consumer expenditures were about equal to those of 1948, and appeared to be quite stable throughout the year. The composition of consumer buying, however, underwent some change. Consumers spent 4 percent less on food in 1949 than in 1948, and more for services and durable goods. Sales of automobiles were especially high, reaching an all-time record.

An increase in consumer credit in 1949 was a significant factor in the high level of consumer expenditures. During the year, new loans exceeded repayments by about 2.4 billion dollars and the total outstanding consumer debt rose to 18.7 billion. This amount was equivalent to 9.7 percent of total consumer disposable income; in 1948 the comparable ratio was 8.5 percent; in 1939 it was 11.3 percent.

Food exports in 1949 were almost 10 percent less than in the previous year. Production abroad increased somewhat and larger food supplies were available from other surplus producing areas. The shortage of dollars and the devaluation of currency in many countries last fall made prices of food produced in the United States somewhat higher than in other surplus food producing countries. Accordingly, deficit producing countries tended to buy less from the United States and more from non-dollar areas insofar as they could.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1946, 1947, 1948, 1949 and forecasts for 1950 with percentage comparison 1/

(Primary distribution weight)

Commodity	Average 1935-39	1946	1947	1948	1949 Prel.	Forecasts for 1950	1950 as a percentage of 1935-39	1950 as a percentage of 1949
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Percent	Percent
Meats (carcass weight) - Total	126.2	153.4	155.0	146.4	145.3	148.0	117	102
Beef	55.2	61.3	69.1	63.3	64.2	62.5	113	97
Veal	8.1	9.9	10.7	9.4	8.7	8.3	102	95
Lamb and mutton	6.8	6.6	5.4	5.0	4.1	3.7	54	90
Pork (excluding lard)	56.1	75.6	69.8	68.7	68.3	73.5	131	108
Fish (edible weight) - Total	11.1	11.0	10.6	11.1	11	2/	-	-
Fresh and frozen	5.3	6.2	6.2	6.3	2/	2/	-	-
Canned 3/	4.8	3.8	3.6	3.9	2/	2/	-	-
Cured	1.0	1.0	.8	.9	2/	2/	-	-
Poultry products								
Eggs 4/	37.3	46.8	47.4	48.2	46.9	49.4	132	105
Chicken (dressed weight)	17.9	25.4	23.6	23.0	25.1	24.2	135	96
Turkey (dressed weight)	2.6	4.5	4.5	3.7	3.9	4.4	169	113
Dairy products								
Total milk (whole milk equivalent)	801	813	794	750	758	737	92	97
Cheese	5.5	6.6	6.9	6.8	7.2	7.3	133	101
Condensed and evaporated milk	16.7	18.5	20.4	20.6	19.9	20.6	123	104
Fluid milk and cream	340	423	398	387	382	370	109	97
Fats and oils - Total, fat content 5/	44.7	39.7	41.8	42.5	42.1	43.0	96	102
Butter, farm and factory (actual weight)	16.7	10.5	11.2	10.0	10.6	10.2	61	96
Lard	11.0	11.8	12.7	13.0	12.2	13.0	118	107
Margarine (actual weight)	2.9	3.8	5.0	6.1	5.7)			
Shortening	11.7	10.1	9.3	9.6	9.7)	23	110	102
Other edible fats and oils	6.3	6.2	6.9	7.0	7.1)			
Fruits								
Fresh - total	137.7	140.9	145.5	131.1	128.7	123.9	90	96
Citrus	48.9	58.7	61.9	53.9	47.3	45.6	93	96
Apples (Commercial)	30.4	23.2	25.2	25.8	26.4)			
Other (excluding melons)	58.4	59.0	58.4	51.4	55.0)	78.3	88	96
Processed								
Canned fruit	14.9	21.8	18.2	18.0	18.2	2/	-	-
Canned juices	3.9	17.7	16.3	18.1	15.3	2/	-	-
Frozen	.8	3.1	3.2	3.0	3.2	2/	-	-
Dried	5.8	4.5	4.4	4.0	4.2	2/	-	-
Vegetables								
Fresh	235	272	252	261	251	251	107	100
Canned	29.9	46.5	40.0	36.7	38.2	2/	-	-
Frozen	6/ .4	2.0	2.6	3.0	2.6	2/	-	-
Potatoes	131	127	124	112	108	2/	-	-
Sweetpotatoes	21.4	18.2	15.9	12.9	14.1	2/	-	-
Dry edible beans	8.8	8.6	6.4	6.5	7.5	2/	-	-
Sugar, refined	97.0	74.4	91.1	95.6	91.6	93.4	96	102
Grains								
Corn products:								
Corn meal	22.9	15.9	14.6	14.5	15	15	66	100
Corn sirup	7.6	11.8	12.8	8.2	8.8	9	118	102
Corn starch	1.3	1.8	1.9	1.7	1.8	1.8	138	100
Corn sugar	2.7	3.8	4.5	4.0	4.2	4.2	156	100
Breakfast cereals	1.6	2.0	1.7	1.5	1.6	1.6	100	100
Hominy	1.4	2.4	2.4	2.4	2.4	2.4	171	100
Oatmeal	3.9	3.7	3.5	3.2	3.2	3.1	79	97
Barley food products 7/	1.4	2.0	1.9	1.5	1.5	1.5	107	100
Wheat:								
Flour 8/	153	154	136	136	137	137	90	100
Breakfast cereals	3.7	3.3	3.3	3.3	3.3	3.3	89	100
Rye flour	2.2	1.8	1.3	1.4	1.4	1.4	64	100
Rice, milled	5.6	4.0	5.8	4.8	5.7	5.6	100	98
Beverages								
Coffee 9/	14.0	19.9	17.3	18.0	19.5	2/	-	-
Tea	.67	.52	.55	.55	.56	2/	-	-
Cocoa beans	4.4	4.2	4.2	3.7	4.1	2/	-	-
Peanuts (shelled)	4.4	4.7	4.6	4.4	4.4	2/	-	-

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.

1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 374 in 1946, 379 in 1947, 386 in 1948, 375 in 1949 and 395 forecast for 1950. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ All barley food products in terms of malt equivalent. 8/ Includes white, whole wheat, and Semolina flour. 9/ Green bean basis.

Prospects for 1950

Retail food prices are expected to average somewhat lower again next year, but no sharp decline is anticipated. With normal weather conditions, food supplies probably will be a little larger than last year, and civilian per capita consumption is likely to equal and perhaps even exceed slightly the 1949 level. The factors affecting consumer purchases -- i.e., general economic activity, employment and income -- probably will weaken only slightly so that consumer purchasing power will continue high.

The domestic economy will still receive strong support from relatively large Federal Government expenditures in 1950. In addition State and local Government expenditures, especially for the construction of schools and highways, are expected to expand still more. The proposed reduction in foreign aid expenditures of the Federal Government may result in some decline in exports of food, especially during the latter half of 1950.

Consumers are expected to spend a relatively smaller proportion of their income for food than in 1949 but still more than before the war. Last year more than 30 percent of total consumer disposable income was spent on food; in 1947 the relationship was almost 34 percent and in 1948 over 32 percent. In the prewar years (1935-39) food expenditures accounted for 28 percent of disposable income.

NUTRITIONAL REVIEW 1/

In 1950, domestic consumption of such foods as pork and pork products, turkey, eggs, potatoes, leafy, green and yellow vegetables, and sugar, is expected to increase slightly. Not only will this result in a halt in the downward trend since 1946 in supplies of most nutrients, but it will also result in a one to two percent increase in available supplies of food energy, fat, vitamin A, thiamine, and niacin.

Shifts in the consumption of other commodities will also have some effect on the supplies of individual nutrients. For example, the increase in the supply of thiamine is mainly a result of the expected rise in pork consumption, because no change is expected in consumption of grain products.

Although the quantity of ascorbic acid available for consumption in 1950 will be at about the level of 1949, its sources are not the same. The freeze damage and recent tropical storms will result in less citrus fruit in 1950. This will be reflected in a decrease in ascorbic acid supplies. However, the decline in ascorbic acid from this source may be made up by an increase in the consumption of tomatoes, and leafy, green and yellow vegetables.

Likewise, the protein level appears to be the same as last year although its sources are not identical. Additional protein from increased egg consumption will offset the decrease in protein resulting from a decline in milk consumption.

Of major significance is the continued decline in the consumption of fluid whole milk and cream which is reducing the available supplies of calcium for the fifth consecutive year.

During 1950, the major nutrients available for civilian consumption per capita per day are expected to range from 9 to 13 percent below the peak years of 1945 and 1946, but are expected to be well above the 1935-39 average.

1/ Prepared by the Bureau of Human Nutrition and Home Economics.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1946 to 1949 and preliminary estimates for 1950, with percentage comparisons 1/

Nutrients	Units	Average 1935-39	1946	1947	1948	1949	Forecasts for 1950	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Food energy	Cal.	3,240	3,380	3,350	3,250	3,230	3,270	101	101
Protein	Grams	89	105	98	94	94	94	106	100
Fat	Grams	131	146	144	139	140	143	109	102
Carbohydrate	Grams	429	417	420	403	401	403	94	100
Calcium	Grams	.92	1.14	1.08	1.04	1.04	1.03	112	99
Iron	Mg.	14.0	19.1	18.1	16.7	16.8	16.8	120	100
Vitamin A value	I.U.	8,100	9,500	8,800	8,600	8,400	8,600	106	102
Thiamine	Mg.	1.55	2.35	2.13	2.05	2.04	2.08	134	102
Riboflavin	Mg.	1.88	2.61	2.46	2.36	2.34	2.35	125	100
Niacin	Mg.	15.5	21.9	20.7	19.2	19.2	19.4	125	101
Ascorbic acid	Mg.	114	137	130	125	119	119	104	100

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for 1946-50 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour.

COMMODITY REVIEWS

Meat

Review of 1949

Apparent civilian per capita consumption of meat in the United States in 1949 was practically the same as the 146 pounds consumed in 1948. Total production increased a little in 1949, but not enough to keep pace with our growing population. Part of the small increase in output as offset by reduced imports. Although the meat consumption rate in 1949 was 10 pounds below the 39 year record high of 155 pounds per capita reached in 1947, it was 18 pounds above the 1935-39 average rate of 126 pounds. Civilian per capita consumption in 1949 compared with 1948 was slightly larger for beef, but slightly smaller for each of the other kinds of meat.

The slight increase in meat production over the 1948 output, due mainly to larger supplies and lower prices of feeds, was entirely in beef and pork. About 4 million more hogs were slaughtered in 1949 than a year earlier, but pork output was up less than 2 percent because the average weights of the hogs marketed was lighter and the dressed yield of pork per 100 pounds was lower. On the other hand, although the number of cattle slaughtered was down more than 400,000 from 1948, beef production was about 4 percent higher, because the larger quantity of grain fed to cattle resulted in heavier average slaughter weights. In 1949 cattle slaughtered under Federal inspection averaged 977 pounds per head, compared with 945 pounds a year earlier.

Production of veal in 1949 was about 7 percent below the previous year. For the most part the reduction from the 1948 level in the number of calves slaughtered reflected a greater holding of calves for feeding and for addition to breeding herds. The latter is an important element in the apparent rise beginning in cattle numbers in the United States, in contrast with the decline in numbers which occurred from 1945 to 1947.

Only about 600 million pounds of lamb and mutton were produced in 1949, the smallest quantity since the mid-1920's. Sheep numbers have been reduced drastically since 1942. However, indications are that the decline in sheep numbers was greatly retarded in 1949.

Imports of meat in 1949 were smaller than they were a year earlier. In 1948 imports were stimulated by very high prices in this country, and were especially large in the several months after Canada removed her export restrictions on beef and lamb in August of that year. Total imports of meat during 1948 amounted to 350 million pounds as converted to carcass weight equivalent, 214 million pounds more than the total of our exports and shipments to territories. Imports in 1949 were smaller, the reduction appearing mainly in smaller imports of beef from Argentina.

Retail prices of meat in large cities as reported by BLS averaged somewhat lower in 1949 than in 1948, with most of the decline occurring in pork. Lamb prices averaged higher than in the previous year. Lower prices for meat in 1949 represented chiefly a reduction in demand, since supplies available for consumption during the year were about equal to those in 1948. The demand for meat was exceptionally strong during the first 8 months of 1948; thereafter prices began a decline that continued until February 1949, and the general 1949 level continued lower than that of the first part of 1948.

Prospects for 1950

Meat production is increasing, and supplies in 1950 are likely to be sufficiently high to raise civilian consumption somewhat. It is likely that all of the anticipated increase will be in pork, output of which will rise as a result of the large pig crops in 1949 and a further increase in prospect for the 1950 spring pig crop. Supplies of beef and veal may be little different from those in 1949. Less lamb and mutton will be available, according to present indications, because producers are expected to hold back lambs for rebuilding of herds.

Since the income of consumers may remain fairly stable, prices of meat in 1950 may not average much below the 1949 level. The prospective increase in pork supplies probably will result in lower average pork prices. Prices of meat are expected to change seasonally, in response to seasonal changes in meat supplies and in demand. Beef prices may decline this spring before increasing to their seasonal high level in late summer and early fall. Pork prices are likely to be higher in the late winter and again in late summer months, and lower near the end of the year when hogs from the 1950 spring pig crop are marketed in large volume. Since that crop is expected to be about 6 percent greater than the spring pig crop in 1949, pork prices near the end of the year may be the lowest since OPA price controls were removed in 1946. Lamb and mutton have been high in price relative to other meats for a number of months, and are likely to continue so during the anticipated short supply year of 1950.

The U. S. Department of Agriculture recently announced that it would accept offers of pork products for purchase in supporting the price of hogs at 90 percent of parity under the Government support program which expires on March 31, 1950. As late as the week ended January 28, no purchases had been made. No announcement has been made regarding support for hogs after that date, or for other meat animals at any time in 1950. Present legislation authorizes but does not require the Government to support prices of meat animals in 1950.

Fishery products 1/

Review of 1949

Consumption per capita of fishery products by United States civilians in 1949 did not differ much from the preceding year. The demand for fresh and frozen fish was relatively stable throughout most of the year and retail prices of leading species in large urban areas, according to the Bureau of Labor Statistics, declined only about one and one-half percent from the 1948 average.

The commercial catch of fishery products in 1949 was slightly higher than a year earlier. Landings in the New England ports, a very important wholesale distribution area for fresh and frozen fish in the United States were smaller than in 1948. As in recent years, the inadequate resources in local waters made voyages to distant fishing grounds necessary.

Commercial freezing of fishery products in continental United States for human consumption was about 5 percent greater than the 241 million pounds produced in 1948. Domestic cold storage stocks of frozen fish for food use at the end of 1949 were slightly lower than a year earlier. The 1949 pack of canned fishery products was slightly higher than that of the preceding year. Production of canned salmon -- especially of pink salmon -- and pilchards was larger than last year, while the pack of tuna was not much different from the record output of 1948. The mackerel and Maine sardine packs in 1949 did not differ much from those of a year earlier. Canned fish stocks at the end of 1949 were higher than at the beginning of the year.

Military acquisitions of fishery products were less in 1949 than in the preceding year. Procurement of frozen fish was more than 5 percent above the 16.5 million pounds bought in 1948, but not as much canned fish was bought.

Imports of edible fishery products from January to November 1949 were slightly smaller than a year earlier. Receipts of fresh, frozen, and canned fish from foreign countries were less than in the comparable months of 1948 but those of cured fish were greater. Exports of fishery products for human consumption were half again as large as in January-November 1948, with increases reported for fresh and frozen fish, canned and cured products.

Prospects for 1950

Civilian per capita consumption of fishery products in 1950 probably will continue at about the rate of the past 2 years. Retail prices are expected to average lower than in 1949.

Cold-storage stocks of frozen fish on January 1 appear to be sufficient for domestic needs until early spring when commercial fishing operations will expand seasonally. Stocks of the popular species of canned fish in the hands of packers and their selling agents at the beginning of 1950 were somewhat

1/ Prepared in cooperation with the Fish and Wildlife Service, U. S. Department of the Interior.

higher than a year earlier, and are expected to be large enough to meet the anticipated domestic and foreign demand for canned fish at prices somewhat below the previous year until the 1950 pack begins to move to market in large volume late next summer.

Foreign trade of the United States in fishery products in 1950 may be slightly different from the previous year's pattern. Exports, mainly of canned fish, probably will remain low relative to the levels reached during the immediate post-war period. Imports of frozen fish fillets and canned fish are expected to be somewhat larger than in 1949.

Poultry and Eggs

Review of 1949

U. S. civilians consumed 375 eggs per person in 1949, more than one-fourth above the prewar (1935-39) average, but lower than the average of the other post war years. Production was slightly greater than in 1948, and the seasonal pattern was significantly different from prewar. Production in each of the last four months of 1949 set new records for the months. Continued increases in the rate of lay per hen and a slightly larger number of layers resulted in unusually high output in the months when eggs have hitherto been relatively scarce. Government purchases of eggs under the support-price program in 1949 were more than double the 85 million dozen (shell equiv.) procured in the preceding year. BLS retail prices of eggs in large cities averaged 4 percent lower in 1949 than a year earlier.

More poultry was consumed by civilians in the United States in 1949 than in the year before. Chicken meat consumption per capita of about 25 pounds was about 10 percent above the 1948 rate and the highest since 1946. Production of chickens during the year set a postwar record. Both commercial broilers and chickens from farm flocks contributed to the increase in output. Cold-storage holdings of chickens at the end of 1949 totaled 160 million pounds.

Turkey consumption per capita in 1949 by U. S. civilians was more than 5 percent higher than a year earlier and 50 percent above the 1935-39 average. Production was the second highest on record, exceeded only by the crop of 1945. At prevailing prices, the supply of turkey provided a surplus for sale to the Government under price support, and for increased carry-over in cold-storage stocks. Stocks of turkey in cold-storage at the end of the year were more than double the rather low stocks at the beginning of the year, and higher than the 1945-49 average for that date. Retail prices of turkeys in the last few months of 1949 were much lower than in the same months of 1948, but apparently not much different from prices in other recent years.

Prospects for 1950

Consumers probably will eat more eggs in 1950 than in 1949. Egg production during the first 6 - 8 months of 1950 is likely to be greater than in the same period last year, with retail prices sharply reduced. Supplies in the remainder of 1950 will depend in large part on the number of chicks hatched this spring. Present indications are that the number of

chicks started this spring will be smaller than the large number in the comparable months of 1949. Accordingly, egg supplies may decrease more than usual in the late summer of 1950, and retail prices may increase more than seasonally. Even if the reduction in the number of chickens raised occurs in accordance with present expectations, egg supplies and civilian consumption per person is expected to be larger than in 1949.

Stocks of all poultry meat in cold storage on January 1, 1950 were large, exceeding those for any previous January 1 except the three years 1946-48. In addition to these ample stocks, supplies will continue to come forward from the large placements of broiler chicks which were made during the last quarter of 1949. Later the mature birds in farm flocks will contribute substantially to fresh supplies. While volume movement to market of chickens from farm flocks ordinarily does not occur until almost the middle of the year, the fact that there were 6 percent more mature birds on farms this January 1 than a year earlier indicates a continued large supply of poultry meat from this source. The potential large supplies of poultry meat from mature chickens will be offset to some extent in 1950 by the expected decrease in the number of chickens to be raised on farms. In recent years, mature farm chickens, young farm chickens, and the output of specialized broiler enterprises each contributed about one-third of the total chicken meat supply.

Dairy products

Review of 1949

U. S. civilian per capita consumption of dairy products was slightly lower (on a fluid milk equivalent basis) than in 1948 and approximately 5 percent below the 1935-39 prewar average. Among the major dairy products, consumption per capita was higher in 1949 than a year earlier for butter and cheese, and about the same for fluid milk and cream. Civilians consumed less evaporated milk and ice cream than in 1948. The changes in consumption among the several dairy products did not follow production changes largely because of Government purchases under the support-price program and changes in commercial stocks.

The index of retail prices for all major dairy products in large cities in 1949 was nine percent lower than a year earlier, according to reports of the Bureau of Labor Statistics. Butter prices were more than 16 percent below the 1948 average; milk delivered to homes was about 4 percent lower; milk purchased at stores, almost 5 percent lower; and evaporated milk 11 percent lower.

Milk production on farms in the United States tended to increase through 1949. This was a result of several factors, among which were (1) an apparent cessation in the decline in cow numbers which had been under way since 1944, (2) an expansion in concentrate feeding, and (3) mild weather in the closing months of 1949.

Milk production on farms was 118.3 billion pounds, compared with 115.5 billion pounds in 1948. In the first quarter of 1949 milk was produced at an annual rate of about 117.5 billion pounds. The increase from these months to the seasonal peak during the second quarter was a little less than usual, but the production decline from June to the end of the year was also less than usual. On a per capita basis, milk production in 1949 for human consumption was just slightly above the record low of 788 pounds a year earlier.

Consumption of fluid milk and cream per person was slightly smaller than in 1948. But population in 1949 was larger and the total consumption of fluid milk and cream was practically the same as last year. Most of the increase in total milk output was reflected principally in larger quantities available for manufactured dairy products. The increase in output of butter alone was equivalent to more than the increase in farm output of milk. Moreover, cheese production in 1949 was about 10 percent greater than a year earlier. Output of most other manufactured dairy products declined from 1948 levels.

Foreign trade of the United States in dairy products was smaller than in 1948. Exports of dairy products, principally cheese, evaporated milk, and nonfat dry milk solids, were at a relatively high level in the early months of 1949 but declined in the latter part of the year. Total exports of milk products for the year were more than 10 percent below the 3 billion pounds (fluid milk equivalent basis) exported in 1948. Imports were about one-fourth higher in 1949 than the 228 million pounds (fluid milk equivalent basis) in the preceding year.

During 1949 the U. S. Department of Agriculture purchased 115 million pounds of butter, 436 million pounds of nonfat dry milk solids (110 million pounds of which were purchased specifically for export to countries receiving aid under foreign assistance programs), and 40 million pounds of cheese, including about 15 million pounds for school lunch distribution. By the end of 1949, Department of Agriculture unsold stocks of nonfat dry milk solids had been reduced to 170 million pounds, mainly as a result of large sales to the International Children's Emergency Fund program of the United Nations, but almost all of the butter and cheese was still in stocks at the year's end.

Prospects for 1950

With normal weather and the number of dairy cows remaining at a stable level or even increasing slightly during the year, milk production in the United States in 1950 probably will exceed last year's output by 1 to 2 percent. Civilian consumption per capita of dairy products may be a little less than in 1949, along with a slight change in the composition of the products consumed. If consumer incomes should decline slightly and the retail price of fluid milk is maintained at the level prevailing at the turn of the year, per capita civilian consumption of this product may show a small decline in 1950.

Exports of dairy products from the United States in 1950 are likely to be lower than last year because of the effect of increased output abroad and the devaluation of foreign currencies in terms of dollars last fall. Devaluation of the foreign currencies made the prices of dairy products produced in the United States more expensive relative to dairy products from other sources. On the other hand, imports of dairy products into the United States may increase further in 1950. Such imports will consist mainly of cheese; imported cheese probably will constitute a larger proportion of cheese consumption this year than at any time since the beginning of World War II, but still less than 5 percent of anticipated supplies in 1950.

Retail prices of dairy products may average slightly lower than last year. Prices of manufactured dairy products are likely to be stable throughout 1950. This stability reflects continued very large production of manufactured dairy products and the fact that Government support prices at the wholesale distribution level have been established for the 15 months period ending March 31, 1951. There is no direct Federal Government support price on milk for fluid use, and the price for this product will continue to be established through marketing agreements and orders, State-local control boards, and other means. Currently the price differential between milk for fluid consumption and milk used for manufactured dairy products is unusually large.

Fats and Oils

Review of 1949

Civilian disappearance per person of food fats and oils was a little lower than the 42.5 pounds (fat content basis) estimated for 1948. Higher consumption of butter and slightly higher consumption of shortening and vegetable oils used in products other than margarine and shortening were more than offset by a reduction of nearly 1 pound per capita in lard and about 1/2 pound in margarine.

Output of all fats and oils for food use increased in 1949 by about 10 percent over the 7.3 billion pounds produced a year earlier. Margarine, down 5 percent, was the only food product for which production was below the 1948 level. However, margarine production was still the second highest of record. The output of butter and lard each was more than 10 percent greater in 1949 than a year earlier, and a 5 percent increase was reported for shortening. The quantity of vegetable oils used in other edible oil products was 35 percent above the 1948 level.

With total civilian consumption of fats and oils slightly higher than in 1948, and unusually large exports drawing off most of the increase in production, factory and warehouse stocks at the end of 1949 increased only slightly over a year earlier. During 1949 the inventory of fats and oils underwent sharp changes. At the beginning of the year, stocks were 126 million pounds greater than on January 1, 1948, and by April 1 were over 300 million pounds higher than on the comparable date in 1948. However, these stocks were heavily drawn upon to meet domestic consumer demand and by unprecedented large exports. By October 1, stocks had been reduced 467 million pounds below those of the preceding April 1. During the fall months, with production at the seasonal peak, factory and warehouse stocks increased and on January 1, 1950 totaled 943 million pounds, 67 million pounds more than a year earlier.

Record exports of food fats and oils (including shipments to U. S. territories) totaled about 1,300 million pounds, as compared with 458 million in 1948. Exports of lard were well over double the 1948 total and those of vegetable oils used in edible products were over 3-1/2 times as large. In addition, exports of soybeans and peanuts for crushing abroad amounted to 374 million pounds (oil equivalent), an increase of 60 percent over the 1948 total.

Retail prices of food fats and oils averaged substantially lower than the year before, declines ranging from 35 percent for lard to 11 percent for salad dressing. The price of butter dropped 16 percent, from an average of 86.7 cents per pound in 1948 to 72.4 cents in 1949. In February, the Government

announced a support program for butter. The support price at the wholesale distribution level was 59 cents per pound from February 8 to July 26, and 62 cents per pound from July 27 to December 31. Government purchases totaled 115 million pounds. The spread between retail prices of butter and margarine was 41.5 cents per pound, compared with 45.3 cents in 1948. The price of lard, after dropping sharply from 24.3 cents per pound in January to 19.9 cents per pound in February, remained relatively stable at around 19 cents during the remainder of the year. Large exports of lard and edible vegetable oils in 1949 prevented sharper price declines for these products than did occur.

Prospects for 1950

Production of food fats and oils in 1950 will be larger than in 1949, and retail prices probably will average lower. As a result, civilian disappearance per person may be somewhat greater than in 1949. The increase may come mainly in lard, since output of this commodity will increase materially over 1949. Vegetable oils used in other edible oil products is also expected to increase somewhat. Butter consumption probably will decline slightly despite the expected rise in production, because of increased competition for the consumer dollar from other bread spreads.

Output of edible fats and oils (including oil equivalent of anticipated exports of soybeans and peanuts) in the year beginning October 1949 probably will total approximately 8.9 billion pounds, more than 100 million pounds greater than a year earlier. Increases in butter and lard are expected to more than offset a decline in peanut oil. Production of vegetable oils was unusually large during the last quarter of 1949. Output of these oils during the remainder of the marketing year is likely to be substantially lower than in January-September 1949; this decline may not be offset by increases in butter and lard production during this period.

Lard output in January-September 1950 is estimated at about 1.8 billion pounds, not quite 100 million pounds more than a year earlier. Reports from farmers indicate that the number of hogs over 6 months old on December 1, 1949 was only about the same as a year earlier, despite the 15 percent increase in the spring pig crop. Since most of the hogs marketed in January-March 1950 will be from those which were over 6 months old on December 1, hog slaughter and lard production in the first quarter of 1950 will probably be about the same as a year earlier. By April 1950, however, with the 1949 fall pig crop coming to market in large volume, lard production is expected to return to a level substantially above a year earlier. The pig crop last fall was 10 percent larger than in the fall of 1948.

Exports of food fats and oils probably will decline somewhat from the record 1949 level. However, they will still remain large in comparison with prewar years.

With domestic output expected to remain high and some decline expected in exports in 1950, prices of food fats and oils other than butter probably will average moderately lower than last year. The price of butter will be supported at the wholesale level at about the same average price this year as in 1949. Based on the 1950 Government support price of 60 cents per pound for 92-score butter, the retail price may average about 70 cents per pound.

Fruit

Review of 1949

Civilian per capita consumption of fresh and processed fruit (fresh equivalent basis) was approximately 210 pounds, slightly smaller than in 1948. Per capita consumption of fresh fruit, comprising about three-fifths of the total fruit consumed, and the various processed products (fresh equivalent basis) were each slightly smaller than in 1948. Consumption of tree nuts about equaled the 1948 rate of 1.5 pounds per capita (shelled basis).

Total production of fruit in 1949 amounted to about 16.7 million tons (fresh-weight), somewhat larger than a year earlier, but nearly a tenth smaller than the record 1946 crop. Weather damage reduced the citrus fruit crop to about 6.6 million tons, 15 percent below the output in 1948. Most of this reduction was in grapefruit and lemons. However, the 1949 deciduous fruit crop totaling about 10 million tons was 13 percent larger than the comparable 1948 crop, and more than offset the reduction in citrus.

Deciduous fruits comprised about 60 percent of the total production in 1949, in contrast with only 53 percent in 1948. Among the important deciduous fruits, production was larger in 1949 for apples, cherries, peaches, pears, plums, and prunes, but smaller in the case of apricots, grapes, cranberries, and strawberries. Fewer tree nuts were produced than in 1948. The smaller crop of pecans more than offset the record-large output of almonds, walnuts, and filberts.

Consumption of fresh fruit in 1949 amounted to about 129 pounds per capita, compared with 131 pounds in the preceding year. A reduction of about 7 pounds per person in citrus fruit consumption was nearly offset by the increase in the deciduous fruits. Among such fruits, increases were largest for peaches and pears, of which production was larger in 1949. Imports of bananas were nearly as large as in 1948, but per capita consumption dropped over a pound, reflecting smaller imports as well as the increase in population.

Civilian per capita consumption of canned fruits was about the same as the 1948 rate of 18 pounds. Total supplies of canned fruits were about as large in 1949 as a year earlier, according to preliminary reports. Increased stocks at the beginning of the year were about offset by declines in imports from foreign countries and receipts from territories, especially pineapple from Hawaii. Commercial production of canned fruits was approximately equal to the 1948 pack, which totaled 2.5 billion pounds. There were, however, some notable differences in the composition of production in 1949. Substantially more canned apples and applesauce, pears, sweet cherries, and plums and prunes, and moderately more canned peaches were produced in the 1949-50 pack season than a year earlier. However, these increases were about offset by large declines in the output of apricots and fruit cocktail and salad. Total exports and shipments to territories in 1949 were about one-fifth higher than in the preceding year; military purchases did not change significantly from those in 1948.

Canned fruit juice consumption by U. S. civilians was approximately 15 pounds per capita, about 3 pounds below the 1948 rate. The decrease in 1949 was due to the fact that market supplies were smaller. Domestic production of canned fruit juices in 1948-49, the bulk of which was marketed

in 1949, was 2.1 billion pounds, 16 percent below production in 1947-48. In addition, receipts of pineapple juice from Hawaii were smaller than in 1948, according to preliminary reports. With consumption continuing during the year at a high rate relative to supplies, stocks of canned juices -- especially those of citrus -- at the end of 1949 were the lowest in years. The relatively tight supply situation at the end of the year was eased somewhat by the movement of the new pack of canned orange juice into distribution channels. By January 1, 1950 about 10 million cases of orange juice from the 1949-50 pack had been canned and were already being marketed by producers.

Civilian per capita consumption of frozen fruits, fruit juices and berries slightly exceeded the 1948 rate of 3 pounds, and was equal to the 1947 record of 3.2 pounds. Total supplies were moderately larger than in 1948, because of increased production. The 1949 pack was about 12 to 15 percent larger than the 400 million pounds produced a year earlier. On an individual commodity basis, production in 1949 was greater for concentrated citrus juices -- mostly orange, raspberries, apples and applesauce, peaches, and apricots. Some of the increases were substantial; for citrus juices the increase was more than fourfold. Large declines from the 1948 output level were reported for strawberries and sour cherries. Cold-storage stocks on January 1, 1950 amounted to about 303 million pounds, 10 percent smaller than on the same date a year earlier and 17 percent smaller than the 1945-49 average for January 1.

Dried fruit consumption per capita was about the same as the 1948 rate of 4 pounds. Most of the dried fruit consumed came from the 1948-49 pack of about 445,000 tons (processed weight). This production was supplemented by imports -- mostly of dates, figs and apples -- totaling about 17,500 tons. Total supplies exceeded the amounts that civilians were willing to take at prevailing prices. There were notable surpluses of raisins and dried prunes, a large proportion of which used to be exported but for which the former foreign outlets have largely disappeared. To help provide outlets for the surplus 1948-49 pack of dried fruit, the Government purchased about 124,000 tons. A small part of these purchases was utilized in the school lunch and institutional feeding programs, but most was exported by the Army for relief feeding in Europe. The 1949-50 pack of dried fruits, tentatively estimated at about 500,000 tons (processed weight), is nearly 12 percent larger than that in the preceding production period. Raisins account for most of the increase, but increases were also reported for dried apples, figs, peaches, and pears. The packs of prunes and apricots were about the same as in 1948-49. A small quantity of new-pack dried prunes has already been purchased for use in the school lunch and institutional feeding programs.

Prospects for 1950

Outstanding features in the outlook for fresh fruit in the first half of 1950 are much larger supplies of apples than a year ago and moderately smaller supplies of grapefruit. Supplies of most canned and dried fruits and frozen fruit products are expected to be ample. Retail prices for apples and possibly also pears will continue lower this winter and spring than in the same time last year. On the other hand, prices for most citrus fruits probably will continue higher than in 1949 because of the smaller supplies. Fresh and processed fruits will be seasonally more plentiful during the second half of the year.

Stocks of fresh apples in cold storage January 1, 1950 were 51 percent larger than those a year earlier from the short 1948 crop, but only 8 percent above average for that date. In contrast, cold-storage stocks of pears carried over into 1950 were 8 percent smaller than a year ago and 10 percent smaller than average. Most of the increase in apple stocks this year was in the Eastern States, where production was considerable larger in 1949. Among citrus fruits, supplies of the new oranges and lemons remaining to be marketed after January 21 were slightly larger than a year earlier, but those of grapefruit were moderately smaller. January freezes, this year as last, reduced the production of oranges, grapefruit, and lemons in California and Arizona. The total acreage devoted to strawberry production is 5 percent larger this year than in 1949. With normal weather and average yields, strawberries may be a little more plentiful this spring than last.

With packer and wholesale distributor stocks of most canned fruits about an eighth larger on January 1 than a year earlier, supplies will be sufficient during the first half of 1950 at least to maintain last year's annual rate of consumption per capita. Canned grapefruit juice, and blended grapefruit and orange juice supplies will be considerably smaller than in 1949, while those of canned orange juice and of frozen concentrated orange juice will be much larger.

Although total stocks of frozen fruits were about 10 percent smaller on January 1, 1950 than a year earlier, those of frozen apples, plums and prunes, blackberries, blueberries, and raspberries were considerably larger. Smaller carry-over inventories were reported for such important commodities as frozen cherries and strawberries. Stocks of frozen strawberries are expected to fall very low in the next few months and may even be exhausted before supplies from the 1950 pack become available.

Vegetables

Review of 1949

Civilian per capita consumption of fresh vegetables in 1949 was slightly lower than in 1948, principally as a result of smaller supplies. Production of commercial truck crops for fresh market in 1949 was about 3 percent smaller than a year earlier, although 11 percent above the 1938-47 average. Stocks of fresh vegetables at the beginning of 1949 were large, and were drawn on very heavily during the early part of the year when supplies from the winter crops were low. Carry-over stocks at the end of the year were below those at the beginning. As in former years, the foreign trade of the United States in 1949 was negligible in comparison with total domestic production. Imports were smaller and exports larger than in 1948, and both were much larger than the average for the prewar years 1935-39. Retail prices of fresh vegetables in large urban areas in the United States, although still at a high level, were slightly lower in 1949 than a year earlier, according to surveys of the Bureau of Labor Statistics.

Canned vegetable consumption per capita by U. S. civilians in 1949 was somewhat higher than in 1948 because of a larger commercial pack. The output of canned lima beans in 1949 was a new high record, while that of snap beans, green peas , and several of the less important vegetables was

somewhat larger than in 1948. Imports and exports of canned vegetables during the year remained insignificant relative to total domestic supplies. Canned vegetable stock data, although still preliminary, indicate that the carry-over at the end of 1949 did not vary much from the level of a year earlier. Retail prices reported by BLS for large cities averaged slightly lower than in 1948.

Preliminary reports point to a probable record output of frozen vegetables in 1949. Consumption per capita by civilians was second only to the record reached in 1948. Carry-over stocks at the end of 1949 were larger than at the beginning of the year.

Production of potatoes was nearly 402 million bushels, more than 50 million bushels smaller than the 1948 crop but still larger than consumer demand at prevailing retail prices. Civilian per capita consumption in 1949 was slightly smaller than the 112 pound rate in the preceding year. Merchantable potato stocks at the end of the year were at a very high level, 5 percent larger than on January 1, 1949. Imports, mainly from Canada, were substantially larger than in 1948. Exports, on the other hand, were considerably smaller. U. S. Department of Agriculture purchases of 1949 crop potatoes under the support-price program as of January 9, 1950 totaled 15.8 million bushels, much lower than the 87 million bushels obtained from the 1948 crop as of the same date in 1949. Additional purchases of 1949 crop potatoes are expected but they probably will not total much more than half the quantity purchased from the 1948 crop.

Sweetpotato consumption was about 9 percent higher than the 13 pounds per capita rate in 1948, but below the prewar 1935-39 average of 21.4 pounds. The 1949 crop was more than 54 million bushels, about 8 percent larger than in the preceding year but 15 percent below the average for 1938-47. Retail prices in large cities were almost one-tenth higher than in 1948 mainly because of short supplies during the first part of 1949.

As a result of the large stocks carried over from 1948, a record large crop in 1949, and lower retail prices, civilian per capita consumption of dry edible beans during the year was a pound higher than in the preceding year. Exports were reduced from 1948 by dollar-exchange difficulties in prospective purchasing countries. Stocks at the end of 1949 were considerably larger than at the beginning of the year.

Civilian per capita consumption of dry field peas in the 1948-49 marketing year was lower than in the preceding year. Supplies during the year were in excess of demand even though prices in general were lower than a year earlier. Carry-over stocks, even including large quantities held by the Government and subsequently exported to Japan, at the end of the marketing period were smaller than in 1948. The 1949 crop of dry field peas was 9 percent smaller than the preceding crop and only half as large as the 1938-47 average production.

Prospects for 1950

Indications are that commercial truck crops for market in early 1950 probably will be 14 percent larger than production a year earlier and 29 percent above the average for the comparable months in 1939-48. Supplies from stocks at the beginning of the year, especially of cabbage and

onions, are smaller than last year, but these are expected to be offset by increased production of cabbage, carrots, lettuce and spinach. Conversely, domestically grown winter-season lima beans, green peppers, shallots and tomatoes will be in shorter supply, totaling from one-third to one-half below that in early 1949. Retail prices for most fresh vegetables are expected to be moderately lower this winter than last if current production prospects materialize.

Supplies of canned and frozen vegetables at the beginning of 1950 are sufficiently large to permit civilian per capita consumption to be maintained at last year's rate until the new pack begins to move to market in large volume about mid-year. Carry-over stocks of canned vegetables on January 1, 1950 were about the same as a year earlier, while those of frozen vegetables were about 30 percent larger. There was more frozen vegetables of all types except asparagus and peas in stock than at the beginning of 1949. Retail prices of canned and frozen vegetables in the next several months probably will be no higher than in the same period of 1949, and may even be slightly lower.

The carry-over of 1949 crop potatoes is large enough to provide plentiful supplies for prospective domestic and export needs until the new crop of potatoes moves to market in considerable volume about mid-May. Further large Government purchases of 1949-crop potatoes during early 1950 for price support will be necessary. Retail prices this year are expected to be lower than in 1949.

With one support price for all grades, more of the better quality potatoes will be available to civilizns in 1950 than last year. Government support purchases out of the 1949-crop potatoes will tend to draw from the market fewer of the better quality and more of the inferior than were taken out of the 1948 crop. The parity price of 1949-crop potatoes, which represents the bulk of domestic supplies until about mid-1950, is approximately one-third lower than for the preceding year's crop.

More sweetpotatoes probably will be available for consumption during the first half of 1950 than during the comparable months last year because of the larger crop in 1949. Retail prices are likely to be lower than during the early part of last year.

Dry edible beans and dry field peas stocks carried over into 1950 were large, with the former probably at a record high level, and more than sufficient to meet prospective domestic and export needs until the new crops of these foods are harvested in the late summer. Civilian consumption of dry edible beans, on a per capita basis, is expected to be somewhat larger than last year because of larger supplies and lower prices, while for dry field peas some increase over the 1949 consumption rate is anticipated.

Grains

Review of 1949

Supplies of wheat, rye, rice, corn, oats and barley available during the year were more than ample to meet domestic needs for food and nonfood use, and the export demand. On a per capita basis, U. S. civilians utilized about the same quantities of grains in cereal food products in 1949 as in 1948.

Total domestic food consumption of wheat in 1949 was 484 million bushels, the highest since 1946. On a per capita basis, civilian consumption of wheat products in the United States was 194 pounds (grain equivalent basis), the same as in 1948, but below the average of 220 pounds in the prewar years 1935-39. The retail price of white bread in large cities was slightly higher than the average of 13.9 cents per pound in 1948 and that of wheat flour about 2 percent lower, according to the Bureau of Labor Statistics.

Stocks on January 1, 1949 of 868 million bushels plus production of 1,146 million bushels and imports of one million bushels totaled 2,015 million bushels for distribution during the year. Exports and shipments to U. S. territories in 1949 totaled 397 million bushels, the third highest on record although lower than in the 2 preceding years. During 1949, in addition to domestic food use and exports (including shipments to territories), about 226 million bushels of wheat were used for seed, animal feed and other nonfood purposes, and 908 million bushels were in stocks at the end of the year.

U. S. civilians in 1949 consumed about 1.4 pounds of rye flour per capita, about the same as in 1948, but more than 35 percent below the prewar (1935-39) average of 2.2 pounds. The rye crop was about 30 percent below output in 1948. January 1, 1949 stocks of 17.3 million, production of 18.7 million and imports of 11.8 million totaled 47.8 million bushels. The distribution of the supplies was as follows: domestic food use, 4.8 million bushels; exports and shipments to U. S. territories, 7.2 million; seed use, 5.0 million; livestock feed, 8.5 million; alcohol and spirits, 4.9 million; and year-end stocks of 17.4 million bushels. During the year, the price of rye produced in the United States was high relative to that in Canada. As a result, imports were very large.

Per capita consumption of rice by U. S. civilians in the 1948-49 marketing year was 5.7 pounds (milled basis), about a pound above a year earlier and equal to the 1935-39 average. The Bureau of Labor Statistics retail price of rice in 1948-49 was 5 percent below the average of 20.7 cents per pound a year earlier. Supplies during the 1948-49 year, amounted to 2,526 million pounds (milled basis). Food use of rice in the United States was 836 million pounds; 326 million went for seed and other nonfood uses; exports and shipments to U. S. territories and military purchases accounted for 1,257 million pounds. Commercial stocks of rice at the end of the marketing year were 107 million pounds, an increase of 84 million pounds from the 1947-48 carry-over.

Corn, oats and barley supplies were more than ample during 1949 for domestic food and nonfood needs, and for export. Civilian consumption of corn products amounting to 50 pounds (grain equivalent basis) per capita, was about a pound larger than in 1948 but slightly smaller than the prewar (1935-39 average of 51.5 pounds. During the period 1942-47 the annual consumption rate of corn products per person was larger than in any of the immediate prewar years. According to the Bureau of Labor Statistics, the retail price of corn flakes during 1949 was slightly higher than the average of 16.6 cents per 8 ounce package a year earlier; but the price of corn meal was more than 17 percent lower than the average of 10.9 cents per pound in 1948.

The 1949 crop of corn harvested as grain was 3,109 million bushels, exceeded only by the preceding year's crop. The domestic nonfood use of corn in calendar year 1949 for seed, livestock feed and industrial products was 2,652 million bushels. Exports and shipments to territories of the United

States, totaling over 136 million bushels, were greater than in any year since 1938. Imports of corn during 1949, relatively insignificant in size compared to the total supply, were only about one million bushels, about the same as in the preceding 4 years.

U. S. civilian consumption of oatmeal and other oat food products was about the same as the level of 7.7 pounds (grain equivalent basis) per person in 1948. The Bureau of Labor Statistics retail price of rolled oats was 3 percent below the 1948 average of 17.1 cents per pound. Production of oats in 1949 was 1,323 million bushels, more than 11 percent below the 1948 crop, but 7 percent greater than the 1938-47 average. Estimated disappearance of oats in the 1949 calendar year was as follows: domestic food use 36 million bushels; domestic nonfood use for feed, seed, and other purposes, 1,375 million; exports and shipments to U. S. territories, about 26 million bushels.

The per capita civilian disappearance of barley in 1949 was 1.9 pounds (grain equivalent basis), slightly lower than in the preceding year but above the 1935-39 average of 1.7 pounds. This represents the third consecutive year in which barley consumption declined; in 1946 the disappearance was 2.8 pounds per person. The barley crop in 1949 of 238 million bushels was 78 million below that of a year earlier, and the decline was partly offset by a 10 million bushel increase in imports. Exports in calendar year 1949 are estimated at over 30 million bushels, about 50 percent larger than in 1948. Nonfood use of barley for feed, seed and other purposes was 254 million bushels.

Prospects for 1950

Total stocks of grains on January 1 were very large. Supplies of grains in the United States are sufficient to meet both domestic needs and the anticipated foreign demand until the 1950 crops are harvested during the latter half of the year, and also to provide large carry-over stocks of old-crop grain. Civilian per capita consumption of grain products in the remainder of the present marketing year is expected to be about the same as a year earlier, and retail prices of these commodities probably will not be much different from those currently prevailing. Exports of grains are expected to be lower than a year ago. With improvement of food production and distribution abroad, foreign nations are likely to be less dependent upon the United States for their food supplies than they have been in recent years.

Wheat stocks on January 1, 1950 were 908 million bushels, the largest for that date since 1943. Domestic distribution during January-June is expected to be as follows: 230 million bushels of wheat for domestic food use, 24 million bushels for use as seed, and 55 million bushels for livestock feed and other nonfood use. Takings for export (including shipments to U. S. territories) may total about 208 million bushels. As a result the old-crop wheat carry-over stocks on July 1 may total ammost 400 million bushels, about 85 million higher than a year earlier, but substantially lower than the record carry-over stocks of 631 million bushels on July 1, 1943.

Rice supplies for the balance of the 1949-50 marketing year are at a record level. Civilian consumption per capita may be about the same as in 1948-49. Exports during the current marketing year are expected to be larger than the record in 1948-49. Larger carry-over stocks are anticipated for the end of the year. This was an important factor in the determination of the recently announced acreage allotment for 1950 which is about 15 percent smaller than acreage seeded for the 1949 crop.

Stocks of corn on January 1, 1950 were 2,830 million bushels, the largest on record for that date and 7 percent larger than a year earlier. A larger part of the stocks this year were under loan or under Government ownership than on January 1, 1949. Oat stocks at the beginning of 1950 were large, but 10 percent smaller than stocks on January 1, 1949. Supplies are expected to be ample for all domestic needs and for export. Barley stocks on January 1 of 195 million bushels were 16 percent lower than a year earlier. Market supplies of barley will be tighter than for other grains during the first half of 1950. Supplies of barley, however, will be large enough to maintain civilian per capita consumption of barley products during this period at about the same level as in the first 6 months of 1949.

Sugar

Review of 1949

Domestic production of beet and cane sugar in 1949 was about 10 percent larger than a year earlier. Supplies in most off-shore producing areas, with the notable exception of the Philippines, were such as to permit the fulfillment of quotas established under the Sugar Act of 1948. Transportation difficulties during the year impeded the shipment of sugar from Hawaii to the continental United States and made it necessary to reallocate 400 thousand tons from the Hawaii quota to other sugar producing areas. Civilian per capita consumption of sugar in 1949 was 92 pounds (refined basis). Retail sugar prices averaged slightly higher than in 1948.

Distribution of sugar by primary distributors for consumption in the United States during 1949 totaled 7,565 thousand short tons (raw value), about 3 percent more than in 1948. On the basis of comparison with previous years, it is likely that about half of this quantity was directed to industrial users of sugar with the remainder going into channels for direct distribution to household consumers. The United States exports small quantities of sugar, namely refined sugar. In 1949 exports were about 40 percent below the previous year.

Total stocks of sugar at the end of the year were larger than those on hand on December 31, 1948, according to preliminary indications. About all of the increase was in the larger holdings by primary distributors (refiners, sugar beet processors and importers). Invisible stocks in the hands of retailers, wholesalers, and industrial users were not much different from a year ago, and sugar supplies in households of consumers likely to have been about the same as at the end of 1948.

Prospects for 1950

In accordance with the provisions of the Sugar Act of 1948 the Secretary of Agriculture announced on December 22, 1949 a determination that 7,500 thousand tons (raw value) of sugar will be needed to meet consumer requirements for 1950. Prospective supplies from producing areas supplying the United States market appear sufficient to meet domestic consumption needs in 1950. Thus far only a portion of the Philippine quota has been reallocated. Total production in the United States insular areas, Cuba and the Philippine Islands, the major off-shore areas supplying United States needs, is expected

to be about 7 percent less during the 1949-50 crop year than for 1948-49. Present reports indicate the prospective output in these areas at slightly more than 8 million tons (raw basis). World production of sugar in 1949-50 may be slightly below the record large crop of 1948-49.

On the basis of the January 1 stock position and supply prospects in the United States and major supplying areas abroad, sugar supplies are likely to be adequate during 1950. Retail prices are not expected to vary much from the level prevailing at the end of 1949. On the basis of carry-over stocks and the quota determination, per capita consumption of sugar in 1950 may be slightly higher than in 1949. Exports are likely to be about the same as last year.

GROWING IMPORTANCE OF NONFAT DRY MILK SOLIDS IN THE UNITED STATES 1/

The importance of nonfat dry milk solids as a dairy product in the United States increased considerably through the emphasis given it under emergency food programs during the war and under price-support programs since the war. Domestic output of this product in the United States during 1949 was nearly 0.9 billion pounds. In the immediate prewar years, annual output averaged about 250 billion pounds and in the early 1920's production for human use ranged from 25 to 40 million pounds. Various attempts were made to produce dry milk beginning in the middle of the 19th century, but it was not until 1898 that dry skim milk was made without the mixture of other ingredients. There was a strong demand for nutritious, non-perishable dry milk during World War I, just as in World War II. However, the sharp expansion in the dry milk industry did not begin until the middle of the 1920's. Much of the output in the earlier years was for animal feed, but a substantial shift to food uses was under way even before the urgent requirements of World War II reduced the output for feed to a mere shadow of the previous output for that purpose. The growth in output and the distribution of available supply is shown in table 5.

Nonfat dry milk solids are produced by removing practically all the water from liquid skim milk. From 100 pounds of the liquid product about 9 pounds of nonfat dry milk are obtained. There are two processes generally employed for making nonfat dry milk. The method resulting in the more acceptable product is the spray process. For this purpose, partly concentrated milk is sprayed by pressure or centrifugal means into a chamber through which a current of heated air is directed. Droplets of milk dry almost instantaneously to fine particles of powder, which are removed from the air by the force of gravity or of cyclonic motion of the air and, in some cases, with the aid of an air-filtering device. Dried milks made by this method are finely divided and highly soluble.

The second method employed is the so-called roller process. In this method, steam heated revolving rolls or drums are coated with a film of partly concentrated milk, which dries and is scraped off by close-fitting knives after a partial revolution has been completed. The product is then reduced to a powder by some grinding device. The spray-type product is more readily

1/ Prepared by Herbert C. Kriesel, Agricultural Economic Statistician of the Bureau of Agricultural Economics.

reconstituted to liquid form and is more acceptable for most food uses than is the roller product. As a result, the spray type material usually commends a slight premium over the roller-type product.

Table 5.- Supply and distribution of nonfat dry milk solids, United States, 1941 and 1948

Supply and Distribution	1941	1948
	Mil. lb.	Mil. lb.
Supply:		
Total production	366	682
Change in commercial stocks	7 (decrease)	29 (increase)
Imports	-	3
Total	373	656
Distribution:		
Government operations:		
U.S.D.A. purchases:		
Net purchases for export 1/	33	86
Domestic distribution	5	8
Military procurement	7	52
Commercial exports and shipments	8	33
Total domestic non-Government	2/ 320	2/ 477
Bakery	196	306
Dairy	74	89
Meat processing	23	36
Prepared flour mixes	10	15
Confectionery	11	11
Soup manufactures	5	4
Institutions	1	2
Packaged for home use	-	2
Chemicals, pharmaceuticals	-	3
Animal feed	-	6
All other uses	-	3

1/ Excludes transfers to military agencies but includes shipments to U. S territories.

2/ Distribution based on data in "Census of Dry Milk Distribution, 1948", The American Dry Milk Institute, Inc., Chicago, Illinois, 1949. The percentage utilized for the different purposes were determined from these data and applied to the BAE data on disappearance which, including latest revisions, are somewhat greater than the totals compiled by the Dry Milk Institute.

Production of nonfat dry milk solids is highly concentrated geographically in the surplus-producing milk sections of the country, particularly the East North Central States. In 1948, the nonfat dry milk produced required 7.6 billion pounds of skim milk. The 1949 output required more than 10 billion pounds of skim milk. Data by States, however, are not available on 1949 production. In 1948, the East North Central States produced 44 percent of the U. S. total. The West North Central States, mainly because of the contribution of Minnesota, produced 31 percent of the U. S. total. The leading State in output was Wisconsin with 202 million pounds; Minnesota produced 163 million pounds. A larger proportion of total milk output was used in drying by the State of Minnesota than by any other State. Most of the nonfat dry milk output is produced in conjunction with the manufacture of butter, i.e. milk is sold in whole form by farmers and separated in manufacturing plants. The cream is then used for production of butter and the skim milk is dried. The expanded market for nonfat dry milk has been very important in providing many Midwestern farmers with an outlet for whole milk--farmers who formerly separated the milk on their own farms, sold the cream, and retained the skim milk for feeding of hogs, poultry and other live-stock.

Dry nonfat milk contains nearly all the ingredients of whole milk, except for the milk fat. A few of the vitamins are lost in the drying process, particularly Vitamin D. As is noted in the following table, however, nonfat dry milk solids are high in other ingredients essential to healthy human beings. The composition of nonfat dry milk solids aside from the content of minerals and vitamins is as follows: Fat, not over 1 percent; protein, 38 percent; lactose, 50 percent; ash, 8.4 percent; and moisture, 2.6 percent.

Table 6.- Principal mineral and vitamin content of 100 grams of milk, dried whole milk, and dried skim milk

Product	Calcium	Phosphorus	Vitamin A	Vitamin D	Thiamine	Riboflavin	Niacin	Ascorbic acid
	Mg.	Mg.	I.U.	I.U.	Mg.	Mg.	Mg.	Mg.
Fluid milk (3.9 percent fat)	118	93	180	10-50	0.045	0.17	0.10	1
Dried whole milk	949	728	1,400	---	.30	1.46	.70	6
Dried skim milk	1,300	1,030	40	---	.35	1.96	1.10	7

Source: Tables of Food Composition, U. S. Dept. of Agr. Misc. Pub. No.572.

In recent years, one-third to one-half of the domestic output of nonfat dry milk solids has been channeled into non-domestic outlets. Within the domestic market, the bakery industry takes nearly two-thirds of the available supply. The next most important use is in the processing of other dairy products, such as ice cream, cheese, and skim milk drinks such

as cultured buttermilk and chocolate drinks. As increasing quantity of this product has been used in meat processing, i.e. bologna, sausage, etc. Various prepared flour mixes also have contained increased quantities of nonfat dry milk. This outlet absorbed 15 million pounds in 1948 compared with 10 million in 1941. Since 1935, the U. S. Department of Agriculture has furnished nonfat dry milk to the school lunch programs for distribution to school children in those areas of the country where supplies of fluid milk are inadequate. A very small quantity has been used in private homes either for making reconstituted milk or in the preparation of foods in the home. The problem of reconstituting dry milks, together with some flavor difficulty, has hindered their use for drinking. However, opportunities are great for increasing the nonfat milk solids content of many food prepared in the home. 1/

Nonfat milk powder probably is the least expensive milk product available. In some sections of the United States, local milk production for all uses is small, required supplies of dairy products have to be shipped in from distant producing areas, and local storage facilities are inadequate. This is especially the case for whole milk for consumption in the fluid form. No nation-wide retail price is available for nonfat dry milk. However, recently a common price for the product in retail stores of Washington, D. C. was 35 cents per pound. A pound of nonfat dry milk will make about 1 gallon of liquid skim milk. One cup of the powder is sufficient to make 1 quart of liquid skim milk. In many of the recipes suggested by the Bureau of Human Nutrition and Home Economics, of course, the dry product may be used without first reliquifying it. By using nonfat dry milk more milk solids can be incorporated into cooking or baking formulas than if comparable quantities of fluid milk are used. This is especially important since this dairy product is high in calcium and riboflavin, nutrients in which the average diet in the United States requires much improvement.

The major users of nonfat dry milk (i.e., bakers and other food processors) buy their supplies directly from manufacturers. The average price per pound received by manufacturers of nonfat dry milk in 1949 was 12.4 cents for the spray powder and 10.9 cents for the roller powder. Use of nonfat dry milk fits well into efforts being made by private and governmental agencies interested in improving the diets of particular groups in the country, especially the low income families. As people are becoming more aware of the need for regularly consuming larger amounts of the nutrients which are plentiful in nonfat dry milk, the demand for foods containing the nonfat portions of milk is tending to increase. This is in contrast with an apparent decline in demand for butter and other fats. In recent years, the belief has become rather general among nutritionists that excess consumption of calories is as harmful to health as insufficient consumption of some other nutrients.

1/ Recipes including the use of dry milk have been issued recently by the Bureau of Human Nutrition and Home Economics; the title of the release is "How to Use Whole and Nonfat Dry Milk", Agricultural Research Administration, USDA.

Table 7.- Production of major food commodities, calendar years, 1935-39 average, 1947, 1948, 1949 and forecasts for 1950 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1947	1948	1949 Prel.	Forecasts for 1950 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Meats (carcass weight)								
Beef	Mil.lb	6,937	10,428	9,181	9,562	9,550	138	100
Veal	do	1,038	1,599	1,419	1,323	1,300	125	98
Lamb and mutton	do	870	802	753	605	575	66	95
Pork (excluding lard)	do	7,337	10,601	10,246	10,435	11,400	155	109
Total meats	do	16,182	23,430	21,599	21,925	22,825	141	104
Fish (edible weight)								
Fresh and frozen	do	615	754	760	3/	3/	-	-
Canned 4/	do	337	454	485	3/	3/	-	-
Cured	do	74	63	63	3/	3/	-	-
Total fish	do	1,026	1,271	1,308	3/	3/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	5,065	5,057	5,155	5,450	163	106
Chicken (dr. wt.)	Mil.lb	2,327	3,497	3,268	3,834	3,700	159	97
Turkey (dr. wt.)	do	350	606	509	675	675	193	100
Dairy products								
Total milk 5/	do	106,450	121,891	118,337	121,174	122,800	115	101
Cheese 6/	do	669	1,178	1,097	1,193	1,210	181	101
Cond. and evap. milk	do	2,225	3,630	3,831	3,154	3,475	156	110
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	1,646	1,513	1,700	1,800	83	106
Lard 7/	do	1,630	2,427	2,368	2,610	2,800	172	107
Margarine (fat content)	do	303	606	735	689			
Shortening	do	1,529	1,374	1,426	1,497	3,850	160	99
Other edible fats and oils 8/	do	575	1,070	1,257	1,693			
Total fats and oils 9/	do	6,207	7,123	7,299	8,189	8,450	136	103
Fruits								
Fresh:								
Citrus	do	6,875	9,992	8,681	7,658	7,500	109	98
Apples (commercial)	do	4,385	3,937	3,275	4,400	8,950	98	91
Other (excl. melons)	do	4,703	5,513	4,498	5,420			
Processed:								
Canned fruit	do	1,705	2,643	2,511	2,514	3/	-	-
Canned fruit juices	do	333	2,205	2,536	2,129	3/	-	-
Frozen	do	106	353	400	450	3/	-	-
Dried	do	1,118	1,151	890	1,005	3/	-	-

- Continued

Table 7.- Production of major food commodities, calendar years, 1935-39 average, 1947, 1948, 1949 and forecasts for 1950 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1947	1948	1949 Prel.	1950 Forecasts for 1950 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Vegetables								
Fresh 10/	Mil.lb	30,520	36,088	38,511	37,396	38,500	126	103
Canned 11/	do	4,030	6,130	5,822	5,962	3/	-	-
Frozen	do	12/ 78	346	446	500	3/	-	-
Potatoes	Mil.bu	355	389	455	402	3/	-	-
Sweetpotatoes	do	68	56	50	54	3/	-	-
Dry edible beans 13/	Mil.lb	1,360	1,604	1,954	2,006	3/	-	-
Canned baby foods	do	48	368	527	520	3/	-	-
Sugar, raw basis	1,000 sh.tons	1,948	2,158	1,917	2,077	2,150	110	104
Grains								
Wheat	Mil.bu	759	1,367	1,314	1,146	1,135	150	99
Rye	do	44.9	26.0	26.4	18.7	3/	-	-
Rice, milled	Mil.lb	1,340	2,189	2,290	2,503	3/	-	-
Corn, grain only	Mil.bu	2,050	2,137	3,402	3,109	3/	-	-
Oats	do	1,045	1,199	1,493	1,322	3/	-	-
Barley	do	239	281	316	238	3/	-	-
Peanuts	Mil.lb	1,229	2,183	2,338	1,853	3/	-	-

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Forecasts or preliminary indications based on trends in livestock numbers, current or prospective rates of output, average or probable acreages and yields, and such other data or advance estimates as are available. These forecasts are only used to indicate the general level of food supplies for domestic consumption for 1950 and are not official estimates of production. Revisions will of course be made from time to time throughout the year as official indications or estimates are issued through the Crop Reporting Service of the Department. 3/ Not available. 4/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 5/ Includes total farm production of milk and off-farm production. 6/ Excluding full skim, cottage, pot, and bakers' cheese. 7/ Including amount used in manufactured food and nonfood products. 8/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 8.- Retail food prices and total consumer price index, United States, 1940-46 and 1947-49 by months
(Index numbers 1935-39=100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
Jan.	199	182	190	202	143	184	174	269	176	178	184	153
Feb.	197	170	183	201	144	189	173	270	178	183	182	153
March	208	175	188	219	148	199	173	271	179	187	190	156
April	203	176	179	228	153	201	173	270	179	190	188	156
May	204	179	172	200	154	210	172	268	179	189	188	156
June	217	183	172	188	155	208	170	263	180	181	190	157
July	220	203	179	182	155	204	168	264	180	181	193	158
Aug.	228	212	184	178	156	202	166	263	180	182	196	160
Sept.	241	236	195	177	158	202	157	261	181	187	204	164
Oct.	236	233	190	190	160	201	155	256	182	191	202	164
Nov.	227	225	198	196	168	205	156	252	183	195	203	165
Dec.	227	236	205	208	170	212	158	255	184	198	207	167
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949	233	201	187	148	170	219	153	227	176	221	202	169
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170
July	236	204	182	141	170	221	154	228	176	208	202	168
Aug.	240	222	185	144	169	211	150	230	176	209	203	169
Sept.	244	233	185	148	170	209	148	230	177	211	204	170
Oct.	235	228	187	144	169	202	147	228	178	214	201	168
Nov.	229	208	186	140	169	213	146	225	179	265	201	169
Dec.	223	178	186	137	169	208	145	224	179	292	197	168

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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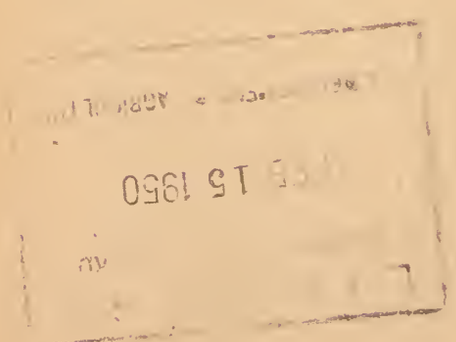

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-52 BAE APRIL - JUNE 1950

Approved by the Outlook and Situation Board, April 28, 1950

SUMMARY

Food supplies for the late spring and early summer are expected to be a little larger this year than in 1949. Retail food prices probably will continue slightly below those of corresponding months of the preceding year. Production of many foods will increase seasonally, but weather and growing conditions have been less favorable for some crops than in the past few years.

Civilian food consumption in 1950 probably will continue at about the same level as in the past two years, on a per person basis. Retail food prices may average slightly lower. On the basis of March information on farmers' intentions to plant and some preliminary crop indications, food production for sale and farm home consumption in 1950 may approximate that of 1949, with increases in livestock production offsetting decreases in a number of crops. The total amount of food exported is likely to be somewhat smaller this year, so domestic supplies probably will be at least as large as in 1949.

Prospective acreages of 17 major crops, for which reports on farmers' intentions are now available, are 2 percent smaller in total than acreage planted in 1949. Increases are indicated for oats, barley, sorghums, sweetpotatoes, soybeans, and sugar beets. Relatively little change is expected in acreage planted in cowpeas, hay, potatoes, and tobacco. But smaller acreages are in prospect for corn, wheat, flaxseed, rice, dry edible beans, dry field peas, and peanuts. Supplies of all of the latter crops were quite plentiful in 1949 and smaller crops this year are not expected to reduce domestic food consumption.

During the next few months, per capita consumption of eggs, turkey, citrus fruit, and processed deciduous fruits may be slightly above apparent consumption a year earlier. Little change is expected for most of the other major foods with the exception of some fresh fruits which have suffered from unfavorable weather in recent weeks.

For the year as a whole, the only significant developments now in prospect in the consumption of major foods are some increase from the 1949 rates in margarine, turkey, eggs, lard, frozen vegetables, frozen fruit juices, and dry edible beans; and some decline in butter, chicken, fresh fruits, and canned fruit juices.

Economic activity in the United States is expected to continue at a high level in 1950, and the purchasing power of domestic consumers will continue at much the same rate as in 1949. So far as changes in retail food prices are concerned, the likely reduction in export demand for United States agricultural food products may about offset the possible pressure of smaller grain crops.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-49 and preliminary indications for 1950, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948	1949	Indications for 1950 1/	1950 as a percentage of 1949
Food grains 2/	116	148	155	164	197	190	165	152	92
Truck crops 3/	124	137	142	158	141	144	144	147	102
Fruits and nuts 4/	108	123	113	133	129	114	124	120	97
Vegetables, excluding truck crops 5/	125	106	110	128	107	123	115	107	93
Sugar crops 6/	81	81	94	103	110	89	99	107	108
Total food crops 7/	116	129	130	145	148	144	137	131	96
Meat animals 8/	149	155	147	145	145	134	136	141	104
Poultry 9/	162	166	170	160	157	153	169	158	93
Dairy products 10/	113	115	119	119	117	114	117	119	102
Total food livestock	140	144	142	139	138	131	136	137	101
Food production	134	140	139	140	140	134	136	136	100
Agricultural production, food and non-food	129	137	134	137	136	138	139	133	96
Civilian per capita food consumption	109	112	114	119	115	111	111	111	100

1/ Production estimates are based on prospective acreage, preliminary crop indications, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1950.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1950 1/

Year	Total food utilization	Source of total food: Food production	Source of total food: Imports	Source of total food: Reduction in stocks	Source of total food: Increase in stocks	Distribution: Civilian	Distribution: Military, including military civilian feeding	Distribution: Department of Agriculture 2/: Net purchases	Distribution: Department of Agriculture 2/: Deliveries	Distribution: Department of Agriculture 2/: Reduction in stocks	Distribution: Department of Agriculture 2/: Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.1	.1		91.4	4/ 3.5	2.1	2.2	.1		3.0
1949	100.0	95.4	5.1		.5	91.4	4/ 3.2	2.2	1.6		.6	3.2
1950 forecast	100.0	94.9	5.1		-	92.1	4/ 2.3	2.0	1.3		.7	3.6
Section b. Percentage of 1935-39 food utilization												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.6	.6		1.6
1945	136.4	130.5	6.5		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.8	125.8	6.9	.1		121.4	4/ 4.7	2.7	2.8	.1		4.0
1949	133.9	127.7	6.9		.7	122.4	4/ 4.3	2.9	2.2		.7	4.3
1950 forecast	134.6	127.7	6.9		-	124.0	4/ 3.1	2.7	1.8		.9	4.8

1/ The upper section of the tabls divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index number basis; that ie, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces.

RETAIL FOOD PRICES

The retail price of food purchased by moderate income families in 56 large cities in the month of March was 196 percent of the prewar (1935-39) average, according to the Bureau of Labor Statistics. Prices in that month were 3 percent lower than in March 1949. The retail price indexes for fats and oils, and canned fruits and vegetables were the lowest since the middle of 1946, before the wartime price controls were lifted; the index for dried fruits and vegetables was the lowest since October 1946, when these controls were terminated.

Retail prices of most foods for January-March 1950 were lower than for the same months last year. The jump in coffee prices which began in the fall of 1949, brought the beverage group up 46 percent from a year earlier, but this was the only commodity group to report notably higher prices. The index for meats averaged more than 3 percent under January-March 1949; dairy products, 5 percent lower; eggs, 22 percent less; fats and oils averaged 18 percent below the comparable months last year; canned fruits and vegetables, 10 percent lower; and fresh fruits and vegetables were 5 percent smaller. Not much change from last year was indicated for cereals and bakery products, sugar, and dried fruits and vegetables.

Retail food prices this spring and summer are expected to continue lower than in the preceding year. For 1950 as a whole, prices probably will average below 1949, in part due to the lag in the reflection in retail food prices of last year's reductions in farm and wholesale prices. Slightly larger supplies of livestock products will also contribute. The smaller food crop output in prospect this year, as a result of the prospective reduction in grain acreage and unfavorable weather in some areas of the country, is not expected to affect retail food prices very much, except for fruits. Most of the production declines are expected in the agricultural crops for which supplies in the past few years have been in excess of demand at support prices. On the whole, retail food prices are not expected to show more than the usual seasonal decline in the latter part of the year.

Total economic activity during the first quarter of 1950 (as measured in terms of the value of the nation's output at current market prices) was lower than the same quarter of 1949 but slightly higher than any other quarter of 1949. The situation in early 1950 was due mainly to an upswing in home construction and in the production of automobiles and other durable goods. Sales of the latter were favorably affected by the spending of veterans' insurance refunds. However, the current favorable economic condition may weaken somewhat later this year because the stimulus of the veterans' insurance refunds will taper off, business expenditures for plant and equipment probably will decline, and exports of U. S. goods may be smaller. The influence of Government expenditures on the domestic economy is expected to continue much the same as last year. The levels of consumer incomes and expenditures for the year are expected to be almost as high as in 1949.

The export demand for United States food supplies will be somewhat weaker this year than last. With agricultural production abroad increasing, foreign nations will be less dependent upon the United States for food supplies than they have been since the end of the war.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1946, 1947, 1948, 1949 and preliminary indications for 1950 with percentage comparison 1/

(Primary distribution weight)

Commodity	Average 1935-39	1946	1947	1948	1949	Preliminary indications for 1950	1950 as a percentage of 1935-39	1950 as a percentage of 1949
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Percent	Percent
Meats (carcass weight) - Total	126.2	153.4	155.0	146.4	145.0	146	116	101
Beef	55.2	61.3	69.1	63.3	64.0	62	112	97
Veal	8.1	9.9	10.7	9.4	8.8	9	111	102
Lamb and mutton	6.8	6.6	5.4	5.0	4.1	4	59	98
Pork (excluding lard)	56.1	75.6	69.8	68.7	68.1	71	127	104
Fish (edible weight) - Total	11.1	11.0	10.6	11.1	11.0	11.2	101	102
Fresh and frozen	5.3	6.2	6.2	6.3	6.2	2/	-	-
Canned 3/	4.8	3.8	3.6	3.9)	4.8	2/	-	-
Cured	1.0	1.0	.8	.9)				
Poultry products								
Eggs 4/	37.3	46.8	47.4	48.2	47.0	48.8	131	104
Chicken (dressed weight)	17.9	25.4	23.6	23.1	25.2	24.2	135	96
Turkey (dressed weight)	2.6	4.5	4.5	3.6	4.1	4.8	185	117
Dairy products								
Total milk (whole milk equivalent)	801	813	787	750	760	750	94	99
Cheese	5.5	6.7	6.9	6.8	7.2	7.3	133	101
Condensed and evaporated milk	16.7	18.5	20.2	20.2	19.9	20.0	120	101
Fluid milk and cream	340	423	398	387	385	380	112	99
Fats and oils - Total, fat content 5/	44.7	39.7	41.8	42.7	43.4	43.9	98	101
Butter, farm and factory (actual weight)	16.7	10.5	11.2	10.0	10.5	10.2	61	97
Lard	11.0	11.8	12.7	13.0	12.1	12.7	115	105
Margarine (actual weight)	2.9	3.8	5.0	6.1	5.7)			
Shortening	11.7	10.1	9.3	9.6	9.6)	24.2	116	101
Other edible fats and oils	6.3	6.2	6.9	7.2	8.6)			
Fruits								
Fresh - total	138.5	138.3	143.5	130.4	128.9	121.5	88	94
Citrus	48.9	58.7	61.8	53.9	47.3	42.5	87	90
Apples (Commercial)	30.4	23.2	25.3	25.8	26.3)	79	88	97
Other (excluding melons)	59.2	56.4	56.4	50.7	55.3)			
Processed								
Canned fruit	14.9	21.8	18.2	18.0	17.2	18	121	105
Canned juices	3.9	17.7	15.7	18.0	15.6	13.7	351	88
Frozen	.8	3.1	3.2	3.0	3.5	3.7	462	106
Dried	5.8	4.5	4.4	4.0	4.2	2/	-	-
Vegetables								
Fresh	235	272	252	261	251	251	107	100
Canned	29.9	46.5	40.0	36.8	38.2	38.8	130	102
Frozen 6/	.4	2.0	2.6	3.0	3.0	3.4	850	113
Potatoes	131	127	124	112	108	110	84	102
Sweetpotatoes	21.4	18.2	15.9	12.9	14.1	14.3	67	101
Dry edible beans	8.8	8.6	6.4	6.5	7.6	8.5	97	112
Sugar, refined	97.0	74.4	91.2	95.7	95.5	7/94-95	97	99
Grains								
Corn products:								
Corn meal	22.9	15.9	14.6	14.5	15	15	66	100
Corn sirup	7.6	11.8	12.8	8.2	8.5	8.5	112	100
Corn starch	1.3	1.8	1.9	1.7	1.8	1.8	138	100
Corn sugar	2.7	3.8	4.5	4.0	4.1	4.0	148	98
Breakfast cereals	1.6	2.0	1.7	1.5	1.6	1.6	100	100
Hominy	-.-	-.-	-.-	2.4	2.4	2.4	171	100
Oatmeal	3.9	3.7	3.5	3.2	3.2	3.1	79	97
Barley food products 8/	1.4	2.0	1.9	1.5	1.5	1.5	107	100
Wheat:								
Flour 9/	153	154	136	136	135	135	88	100
Breakfast cereals	3.7	3.3	3.3	3.3	3.3	3.3	89	100
Rye flour	2.2	1.8	1.3	1.4	1.4	1.4	64	100
Rice, milled	5.6	4.0	5.8	4.8	5.7	5.6	100	98
Beverages								
Coffee 10/	14.0	19.9	17.3	18.2	18.6	2/	-	-
Tea	.67	.57	.58	.56	.59	2/	-	-
Cocoa beans	4.4	4.2	4.1	3.8	4.1	2/	-	-
Peanuts (shelled)	4.3	4.9	4.7	4.4	4.5	2/	-	-

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.

1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 374 in 1946, 379 in 1947, 386 in 1948, 376 in 1949 and 390 indicated for 1950. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ Based on the U. S. consumers' requirement of 7.5 million short tons (raw value) as determined by the Secretary of Agriculture. 8/ All barley food products in terms of malt equivalent. 9/ Includes white, whole wheat, and Semolina flour. 10/ Green bean basis.

NUTRITIONAL REVIEW 1/

The nutritional analysis of the U. S. civilian per capita consumption of food in prospect for 1950 indicate slight changes from 1949 in two nutrients - ascorbic acid and niacin. Available supplies of the other major nutrients may be at about the same levels as last year.

The decline in ascorbic acid is forecast on the basis of smaller consumption of citrus fruit, because unfavorable weather conditions have reduced the citrus crop this year. A larger proportion of the ascorbic acid will come from frozen concentrated orange juice and there will be less from fresh oranges and canned citrus juice than in 1949.

The small increase indicated for niacin would result from prospective consumption of slightly larger quantities of dry edible beans and potatoes.

During 1950, the major nutrients available for civilian consumption per capita per day are expected to range from 9 to 14 percent below the peak years of 1945 and 1946 with the greatest decrease occurring in ascorbic acid.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1946 to 1949 and preliminary indications for 1950, with percentage comparisons 1/

Nutrients	Unit	Average 1935-39	1946	1947	1948	1949	Preliminary indications for 1950	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Food energy	Cal.	3,240	3,380	3,350	3,250	3,240	3,250	100	100
Protein	Grams	89	105	98	94	93	94	106	101
Fat	Grams	131	146	144	139	141	143	109	101
Carbohydrate	Grams	429	417	420	403	401	399	93	100
Calcium	Grams	.92	1.14	11.08	1.04	1.04	1.03	112	99
Iron	Mg.	14.0	19.1	18.1	16.7	16.9	17.0	121	101
Vitamin A value	I.U.	8,100	9,500	8,800	8,600	8,500	8,600	106	101
Thiamine	Mg.	1.55	2.35	2.13	2.05	2.03	2.06	133	101
Riboflavin	Mg.	1.88	2.61	2.46	2.36	2.35	2.35	125	100
Niacin	Mg.	15.5	21.9	20.7	19.2	19.2	19.7	127	103
Ascorbic acid	Mg.	114	137	130	125	120	118	104	98

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for 1946-50 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour.

1/ Prepared by the Bureau of Human Nutrition and Home Economics.

COMMODITY REVIEWS

Meats

The consumption of meat per capita so far in 1950 has been at about the same level as in the early months of 1949. Supplies available in the spring and early summer probably will continue about the same as last year, on a per person basis.

Commercial output of pork was about 4 percent greater in January-March 1950 than in the first quarter of 1949. On the other hand the output of beef was down 4 percent, veal 4 percent, and lamb and mutton 4 percent. The increase in the output of pork reflects the larger pig crops of 1949 as compared with those of 1948 but not fully so because hogs have been slaughtered at lighter weights. The number of cattle and calves on farms on January 1 was slightly larger than the year before, and a few more were being grain fed. However, the lighter weights of cattle on feed January 1 meant longer feeding and probably account for the smaller number marketed early this year.

About as much beef but more pork than last year will be available this spring and summer. The increase for all meat will about provide for the gain in population. On April 1, 8 percent more cattle and calves than a year earlier were on feed in 11 Corn Belt States, but according to feeders' plans the additional number will not appear on markets until late summer or fall. Marketings of grain-fed cattle are expected to increase through the next few months and to reach a peak in late-summer or early-fall.

Commercial production of pork during the spring and summer probably will be larger than a year earlier as a result of the 10 percent increase in last fall's pig crop. In April-June, the increase may be moderately large. During the summer months, which are usually the period of low pork output, the increase in production over last summer probably will be rather small and will result mainly from a larger slaughter of sows. In the fall, pork supplies will expand seasonally and are likely to be moderately larger than in the fall of 1949. Most of the hogs slaughtered in September and later months of the year will come from the 1950 spring pig crop which, according to reports from farmers last December, is expected to be 6 percent above the spring crop of 1949.

Production of lamb and mutton to date has been smaller than in 1949 and is likely to continue at a lower level throughout the year. Some of the reduction may be attributed to the 3 percent decrease in the number of sheep and lambs on farms at the beginning of the year. If the downward trend in numbers which began in 1942 is halted, the most important factor in sheep and lamb slaughter will be the low level of slaughter resulting from a holding back of sheep and lambs for maintaining or increasing herds.

In view of the expected small increase in meat production during the year 1950, it now appears likely that the domestic consumption of meat per capita may be a pound or two above the 145 pound average of 1949.

No significant change from 1949 is expected in exports, imports or military takings of meat this year. As in other peacetime years, nearly all the domestic production of meat will be consumed by the United States civilian population. Imports are likely to remain at about 1 percent of domestic production.

Retail prices of meat in the first quarter of 1950 averaged about the same as a year earlier, when they were low relative to the 1949 average. Beef and lamb prices were higher in January-March this year than last, but pork prices were lower. Prices of pork are beginning to rise seasonally as hog slaughter falls off. A decline in prices is expected during the fall. At their seasonal low point late in the year, pork prices may be both moderately below a year earlier and the lowest since the ending of price controls in 1946.

An interesting development has apparently taken place in the pork price structure. The demand for the lean cuts of pork has apparently continued strong but the demand for the fat cuts of pork has weakened in the past three or four years. Retail price data collected by the Bureau of Labor Statistics in 56 large cities, although not complete in coverage of the various cuts of meat, does give an inkling of what has happened. Pork chops averaged 65.8 cents per pound for the months January to March 1950, 5 percent below the average for the comparable months of 1949 but about equal to the prices in January to March 1947. On the other hand the retail price per pound of both sliced bacon and salt pork averaged 18 percent lower in January-March 1950 than a year earlier and more than 20 percent less than in the same months of 1947. This shift in prices seems to indicate a return to the prewar trend which was interrupted by the wartime shortage of fats. Examination of such information as the slaughter weights of hogs, lard output per hundred pounds live weight of hogs, and lard prices does not reveal any increase in the supply of fat cuts which might be depressing their prices. In fact, there is some trade information which indicates that the opposite is true. Therefore, the shift in pork price relationships appears to be due to the reduced demand for fat cuts.

Prices of the best quality beef, produced from grain-fed cattle, have declined recently and a further reduction is likely in the next month or two. They will probably advance to a seasonal high in late summer or early fall, at which time they may average a little lower than at the same time in 1949. However, it is unlikely that the rise in beef prices which occurred in the last few months of 1949 will be repeated in the same months of 1950. Prospects are that prices of lamb will continue rather high relative to prices of other meats, especially pork.

Fish 1/

Supplies of fishery products in the United States during the early months of 1950 were sufficient to maintain the civilian per capita consumption of these commodities at about the same rate as in the same period last

1/ Prepared in cooperation with the Fish and Wildlife Service, U. S. Department of the Interior.

year, but apparent disappearance was slightly lower. Less fresh fish was marketed but the net movement of frozen fishery products into distribution channels during the first quarter was approximately the same as in the same period of 1949. Trade reports indicate that the movement of the major species of canned fish into consumer channels was more rapid than in January-March last year. Retail prices of fresh and frozen fish in leading cities, according to indexes compiled by the Bureau of Labor Statistics, averaged 272.8, much the same in the first quarter of 1950 as a year earlier. The reported price of canned pink salmon, however, averaging 45.1 cents per pound can, was 26 percent lower than in the first 3 months of 1949.

Weather conditions on the eastern seaboard of the United States during the first quarter of 1950 were not as favorable for commercial fishing operations as they were a year earlier, and preliminary reports indicate that landings were lower. More fishery products were frozen and less sold to the fresh market. The quantity of fish frozen commercially for eventual food use in January-March totaled almost 27 million pounds, 18 percent larger than in the same period of 1949. Cold-storage stocks of fish on April 1 were 82 million pounds, seven percent larger than a year earlier. The reduction in cold-storage holdings between January 1 and April 1, 1950 amounted to 55 million pounds, somewhat less than in the same period of 1949. Stocks are now near the low point of the year but will be built up again as the commercial catch and freezing of fishery products for food use increase seasonally in the next few months.

Domestic supplies of the major species of canned fish (i.e., salmon, tuna, Maine sardines, and pilchards) thus far in 1950 appear to be about equal to these in the same period last year. Present supplies are expected to be sufficient to meet consumer demand at prevailing prices until the new pack starts moving into distribution channels in volume after the middle of the year. Retail prices of the popular types of canned fishery products in the next few months probably will continue lower than a year earlier.

Imports of frozen groundfish (cod, haddock, hake, pollock, and cusk) and rosefish (ocean perch) fillets during the first quarter were almost 4 million pounds larger than those in the same months of 1949. Prospects for 1950 are that imports of fishery products will total more than last year. Exports may show some increase over 1949, but will remain low relative to those in the years 1946 and 1947 when large quantities of canned fishery products were shipped to Europe under relief feeding programs.

Poultry and Eggs

In the first three months of this year, egg and poultry supplies were larger and their prices lower than in the corresponding months of 1949. Supplies will continue larger than last year at least until late summer of 1950.

Egg production in the first 3 months of 1950 was 8 percent larger than in the same months of 1949. Per capita consumption has thus far shown only a small increase over last year. Most of the gain over last year's supply was channeled to cold storage (in both shell and frozen form)

for use later in the year. Retail prices for eggs in large cities during January-March 1950 averaged almost one-fourth lower than for the same months last year and were the lowest since mid-1946, according to the BLS.

Egg supplies in the next few months will continue larger than last year, but output after late summer will depend partly upon the number of pullets kept for laying flock replacements. These pullets will come from chicks hatched in the spring of 1950. Even if egg production in the last quarter of 1950 should fall slightly below that of a year earlier, the reduction from last year could be more than offset by the use of eggs from the stocks likely to be in cold storage at that time.

Through the next month or two, current output of poultry meat will continue to be supplemented by large cold-storage stocks of chicken and turkey carried over from last year. Also, the big turkey crop that is in prospect for 1950 will provide continued large supplies of that product this fall and winter.

The number of young chickens that will be raised this spring is still uncertain. Farmers' intentions in February were to buy 12 percent fewer chicks for laying flock replacements this spring season than last. However, the 1950 hatchery output through March was virtually unchanged from the year before. Nevertheless, the late season hatch may taper off more sharply than last year and chick purchases for the 1950 season may therefore be closer to February intentions than might be expected solely on the basis of early-season reports.

The sources of chicken meat supplies, other than young farm chickens, are mature farm chickens and broilers. Sales of mature farm chickens are likely to show some increase over 1949, as January 1 numbers of laying birds were up 7 percent over a year earlier. Specialized broiler output from now until after mid-year will be above a year earlier, but after mid-year may not be much different from the 1949 level.

Although poultry production in 1949 was at a peacetime record high, domestic per capita consumption did not quite reach the high level attained in 1946. Supplies of poultry and eggs in prospect for 1950 will be sufficiently large to permit a high level of consumption per capita of these commodities.

Dairy Products

Supplies of most dairy products during 1950 will be larger than a year earlier. A little more butter and cheese moved into domestic distribution during the first 2 months of 1950 than a year earlier, but at no more than the average rate for the year 1949 as a whole. Total sales of whole milk for fluid use in 20 markets of the country which have Federal orders in effect have been slightly larger than a year earlier, but probably not much more relatively than the increase in population.

For the first 3 months of 1950 total milk production was 4 percent greater than in the corresponding period last year. This gain reflects both an increase in cow numbers and higher production per cow. Milk production on farms was at an annual rate of about 123 billion pounds in the first quarter of 1950, and it appears quite likely that for the year as a whole production will exceed the 1949 output of 119.1 billion pounds. In fact, if favorable conditions prevail for the remainder of the year, farm milk production probably will at least equal the record of 121.5 billion pounds reached in 1945. With only a slight increase in total consumption of fluid milk and cream likely, the increase in the amount of milk produced on farms will make available larger supplies for use in manufactured dairy products.

The retail price of fluid milk delivered to homes in 24 cities in the first quarter of 1950 averaged a little less than 20 cents per quart, about five percent lower than a year earlier. With a seasonal increase in milk production during the second quarter, a further decline in the retail price of fluid milk and cream is occurring. Despite slightly lower prices in the early part of 1950 than a year earlier, the consumption of fluid milk and cream does not appear to be much if any higher, on a per person basis. U. S. civilian per capita consumption of fluid milk and cream probably will be no greater in 1950 than in 1949.

Utilization of milk in manufactured products in the first part of the year differed somewhat from the pattern of a year earlier. Creamery butter production was approximately 9 percent higher in January, 5 percent higher in February, and 8 percent greater in March than for the corresponding months of 1949. American cheese production at the beginning of the year was about 7 percent lower, and currently is still a little lower than a year ago. Production of evaporated milk in January-February was about 11 percent greater than output in January-February of 1949.

The prospective increases in output of manufactured dairy products this spring and summer are not likely to be reflected in higher domestic consumption. With most dairy products now selling at about support levels, or in usual relationships to items which are under price support, there is little prospect for significant changes in the retail prices of manufactured products. Moreover, consumer demand for most products at current prices appears to be fairly stable and is not likely to show much change. However, the change in margarine legislation leading to lower prices on colored margarine may affect consumer demand for butter. The Department of Agriculture is now buying nonfat dry milk solids (dry skim milk), butter, and cheese as part of its agricultural price-support operations. A purchase program also has been announced for evaporated milk, but none has been purchased to date.

The BLS index of retail prices for all dairy products including butter in the first 3 months of 1950 averaged 5 percent lower than for the corresponding months of 1949. Retail prices for dairy products reached a peak in August 1948, and by January 1950 had fallen almost 15 percent from that point. For manufactured dairy products, retail prices during the past six months have been relatively stable, about in line with the Government price-support levels. In contrast with the steadiness in butter prices, the

retail price of margarine in March 1950 was 14 percent lower than a year earlier. The difference between butter and uncolored margarine prices in February was 45.2 cents per pound, the largest on record. In 1949 as a whole, the U. S. civilian per capita consumption of butter was 10.5 pounds, and for 1950 may be slightly lower.

Stocks of evaporated milk on February 28 were the lowest of the past 22 months. They were about 500 million pounds lower than the peak reached in November 1948 and 105 million less than stocks at the end of February 1949. Retail prices of evaporated milk in 56 large cities in January to March averaged about 12 percent lower than in the same months in 1949, and 21 percent lower than the peak in September 1948. Total consumption of evaporated milk is apparently at about the same level as in 1949.

U. S. Department of Agriculture purchases of manufactured dairy products under the price-support program have been larger thus far in 1950 than in the same period last year, and for the year as a whole, are likely to be larger than last year, as a result of increased milk production. Through April 21 this year, 21 million pounds of butter, almost 6 million pounds of cheese, and 123 million pounds of nonfat dry milk solids were purchased. Through April 23 last year, the Department of Agriculture had acquired 117 million pounds of nonfat dry milk solids; purchases of butter did not begin until late in March, and those of cheese until August. In 1949 the amount of butter and cheese acquired under the price-support program was equivalent to 2.7 billion pounds of milk, roughly 2 percent of the total amount of milk produced during that year.

Fats and Oils

The domestic disappearance of lard and the edible vegetable oils used mainly for food products was about 15 percent larger in January-February 1950 than a year earlier. This was an exceptionally high rate of disappearance, and apparently was at least partly due to the building up of inventories of food fats, especially shortening, by dealers and large consumers.

Wholesale prices of the major edible fats and oils other than butter showed an upward movement from early November 1949 to early April 1950. Increases in the prices of cottonseed and soybean oils, important constituents of shortening and other food fats and oils, were substantial, while the wholesale price of butter remained at about the Government support level of 60 cents per pound. Retail prices of lard, margarine, shortening and salad dressing in large cities declined during the period November 1949 to February 1950 but butter prices were relatively stable. In March, retail prices recovered moderately, but remained below the level of last November.

Total supplies of fats and oils for domestic consumption and export for the next few months will be smaller than in 1949. Current production of edible fats and oils, other than butter, will fall below that of spring

and summer of 1949, but exports of these fats also will be smaller. Reflecting a relaxation of export controls in February 1959, exports in April-June of that year reached a peak not likely to be approached again for a long time.

A prospective moderate increase in lard production during January-September will be more than offset by a decline in the production of edible vegetable oils, as compared with the same period in 1949. Total output of edible vegetable oils in the current crop year, which began in October 1949, is expected to be smaller than in the preceding crop year, but production of these oils in October-December 1949 was larger than in the same period a year earlier.

The total acreage planted in oilseed crops in 1950 may be 5 to 10 percent smaller than last year, with an increase in soybean acreage more than offset by declines for other oilseeds. Farmers' plans may have been modified since early March partly as a result of recent legislation permitting increases in cotton and peanut acreage allotments above those originally announced for these two crops. Another factor that may modify earlier plans is knowledge of individual farm acreage allotments for corn (most of which had not been established by March 1); corn competes with soybeans for acreage. There will be no acreage allotments on soybeans in 1950.

However, if per-acre yields of oilcrops in 1950 should be near the high levels of 1949, output of edible vegetable oils in the 1950-51 marketing year could be at least as large as in 1949-50. Increased output of soybean oil probably will more than offset the reductions in oil output resulting from the decrease in acreage in other oilseed crops. The yield of oil per acre is about 190 pounds from soybeans as compared with about 70 from cottonseed (assuming that the entire yield of beans or seed is crushed). But if per-acre yields are about average or are below average, some decline in edible vegetable oil output in 1950-51 is likely.

Effective July 1, 1950 the special Federal taxes on manufacturers, wholesalers, and retailers of margarine will be repealed, as will the excise tax on manufacturers' sales of this commodity. The law which repeals these taxes also contains new provisions for the regulation of margarine in domestic commerce, intended primarily to prevent confusing this commodity with butter when served in public eating places and when offered for sale in retail stores.

Margarine consumption is expected to be encouraged by the repeal of the Federal taxes. In the first place, the availability of margarine to consumers will be increased by the prospective expansion in the number of wholesalers and retailers handling this product. Previously, many dealers apparently were unwilling to handle margarine because of the responsibility and expense of making monthly reports, or because of the tax liability. In the second place, the repeal of the excise tax will remove the tax of 0.25 cents per pound on the uncolored and 10 cents per pound on the colored margarine. In recent months the excise tax on colored margarine has accounted for about 25 percent of the estimated retail price of the product. Colored margarine, which is preferred by consumers, is expected to replace the uncolored product in stores in the 32 States which do not prohibit the sale of the former. These States have about 60 percent of the population of the United States.

Fruit

Supplies of most fresh and processed fruits will be larger this spring than a year earlier. The volume of citrus fruits to be marketed in the next few months is up some; more apples and pears are still in cold storage; the early strawberry crop is larger this year; and packer and wholesale stocks of most canned fruits and juices are much greater. Imports of bananas, which are an important component of the total fresh fruit consumed in the United States, have been a little larger this year than in the comparable period of 1949.

Cold storage stocks of 1949-crop apples on April 1, 1950 were slightly smaller than the 1945-49 average for that date, but much larger than those a year earlier. Stocks of pears were moderately larger than average and considerably higher than on April 1, 1949. Substantially more fresh strawberries will be on the market during May than in the same month last year. The late spring acreage is slightly larger than last year but cold weather has retarded growth. During the winter season, prices for strawberries were generally lower than a year earlier, while prices during April were higher than last year. The strong demand for strawberries for processing is expected to result in prices being about as high in late spring as they were last year.

Supplies of some deciduous fruits from the 1950 crop for consumption in the fresh form and for processing -- especially peaches for fresh consumption -- will not be as large as last year. Prospective peach production in the Southern States, Illinois and the Pacific Northwest has been reduced materially as a result of early spring frosts. Production of other soft fruits such as sweet cherries, plums and prunes, and apricots, probably will be smaller this year than last in the Pacific Northwest States because of severe freeze damage to trees and buds last winter.

A moderately larger quantity of fresh citrus fruits will be available this spring than last. Current prospects indicate that the supplies of oranges for next summer will be about as large as in 1949, but those of grapefruit will be much smaller. Even though the 1949-50 orange crop is expected to be a little larger than the corresponding 1948-49 crop, U. S. civilian consumption of oranges in the fresh form so far this season has been considerably less than last year. A larger proportion of the crop is being processed this year, especially as frozen concentrated orange juice.

The production of frozen concentrated orange juice in Florida through April 15 this year has totaled nearly 12 million gallons, considerably more than the entire 1948-49 pack in that State. Marketing of the Valencia orange crop in Florida is now under way and an additional large quantity of frozen concentrated juice can be produced from these supplies. In addition to the orange juice, substantially larger quantities of both frozen concentrated grapefruit juice (1.5 million gallons) and blended orange and grapefruit juice (1.3 million gallons) have already been packed in Florida this season.

The commercial production of frozen concentrated citrus juices was started on a small scale in 1945-46, and increased rapidly in subsequent years. In 1948-49, twelve million gallons of orange juice were packed.

This was equivalent to about two 6-ounce cans of frozen juice per person. On a single-strength basis, the U. S. civilian per capita consumption of frozen concentrated orange juice amounted to about 3 pounds in 1948-49, compared with about 4 pounds of canned orange juice. The increase in consumption of frozen orange juice just about offsets the decline in the consumption of the canned juice.

Supplies of frozen citrus juices are expected to continue large this spring, but those of some of the other frozen fruit products -- especially strawberries -- will be smaller than a year ago until the 1950 pack begins to move to market in large volume in late spring and summer. Total cold-storage holdings of frozen fruits, berries, and fruit juices on April 1, 1950 were about 4 percent smaller than comparable stocks a year earlier. Apples, plums and prunes, blackberries, raspberries, blueberries, and fruit juices and purees were the only frozen fruit products for which cold-storage stocks were larger than on April 1, 1949.

The production of canned orange juice in Florida through April 15 was slightly larger, and that of canned tangerine juice much larger, than the comparable 1948-49 pack as of that date last year. Canned grapefruit juice and blended orange and grapefruit juice production were down considerably from the rate of the same period in 1949. In Texas, because of a smaller crop, the 1949-50 pack of canned grapefruit juice was smaller than a year earlier. On March 1, 1950, combined packer and wholesale distributor stocks of canned orange juice were about half again as great as on the same date last year. Stocks of grapefruit juice showed a moderate increase, but those of blended orange and grapefruit juice were slightly smaller than on March 1, 1949. Canned pineapple juice stocks this year were about double those of a year earlier.

Total packer and wholesale distributor stocks of canned peaches, pears, and pineapple were substantially larger on March 1 this year than on the same date in 1949, but somewhat less apricots and fruit cocktail were held. For all five of these canned fruits, the total stocks were 12 percent larger than on March 1, 1949. Supplies of canned apples and applesauce are expected to continue considerably higher this spring than last. Thus far this season the production of canned grapefruit segments in Florida, like that of grapefruit juice, has been below output in the comparable period of 1949.

Supplies of dried fruits are expected to continue plentiful this spring and summer, a result of increased production in 1949-50 over that of a year earlier. This season as last, the marketing of the dried fruit supplies, which are in excess of anticipated demand at prevailing prices, is being assisted by Government programs. The U. S. Department of Agriculture has acquired small quantities of raisins and prunes for use in the School Lunch and also in institutional feeding programs. Movement of other quantities is being aided by diversion, export-payment, and other marketing programs.

Vegetables

Supplies of fresh and processed vegetables, during the first half of 1950 are sufficiently large to allow U. S. civilians to consume as much, if not somewhat more, of these commodities on a per person basis than in the corresponding months last year. Supplies of potatoes and dry edible beans and field peas also are plentiful.

During the 1950 winter season, production of vegetables for fresh use was about 9 percent above output a year earlier, and almost one-fourth above the 1939-48 average for that period of the year. Reports on the spring and summer acreage and production prospects indicate that in general the supplies of fresh vegetables will be as large this year as in 1949. Relative to last spring, supplies this season appear to be largest for onions, shallots, green peppers, lettuce and carrots. Supplies of cabbage, celery, eggplant, and early spring green peas are much smaller. Retail prices of carrots and lettuce in 56 cities thus far in 1950 have averaged slightly lower than a year earlier, and for fresh snap beans and onions slightly higher. The retail price of cabbage averaged about the same as in the early months of 1949.

Current supplies of canned vegetables appear adequate to meet consumer demand at prevailing prices until the 1950 pack starts moving to market in large volume during the summer months. Total stocks (i.e. processor plus wholesale distributor) of major canned vegetables on March 1 this year were slightly larger than on the same date in 1949. There were considerably smaller quantities of canned green peas, tomatoes, and tomato juice held in stock than on March 1, 1949, but this reduction was more than offset by much larger holdings of canned snap beans and corn. Retail prices of peas and tomatoes in urban areas during the months January to March this year averaged lower than in the same period in 1949.

Cold-storage stocks of frozen vegetables on April 1, 1950 were slightly more than 30 percent greater than a year earlier, and are large enough to permit a record high level of U. S. civilian per capita consumption of these commodities during the spring and early summer months. The movement of frozen vegetables out of cold-storage facilities during the month of March totaled 36 million pounds, 13 million more than in March 1949 and 15 million pounds more than the 1945-49 average for that month. Among the various frozen vegetables in cold storage at the beginning of April, asparagus and peas were the only major items for which stocks were lower than a year earlier.

Surplus supplies of potatoes are in prospect. Stocks on hand March 1, 1950 were record large, nearly one-fourth larger than a year earlier and 17 percent greater than the previous March 1 record reached in 1947. In addition, supplies of potatoes from the 1950 early crop have been more than ample. Domestic takings of the 1949 crop through March 1 were about 5 percent greater than takings from the 1948 crop had been through March 1, 1949, exclusive of Government acquisitions under the price-support program.

Retail prices of potatoes in large cities during January through March averaged about 15 percent lower than for the same months in 1949, according to BLS. The average quality of potatoes sold to consumers has been better thus far in 1950 than a year earlier because the Government purchase program for price support is now designed to draw off the market the less desirable grades and sizes, and to permit the choicer grades to be distributed in the regular commercial channels of trade.

Based on the March 1950 reports of farmers' intentions to plant crops, the prospective acreage to be planted in potatoes this year is expected to total about 3 percent less than the planted acreage in 1949. However, if economic abandonment and yields on the prospective acreage are about the same as in the past two years, the 1950 potato production could be from 35 to 50 million bushels in excess of anticipated demand. Retail prices for potatoes this year are expected to average somewhat lower than in 1949.

Marketing of the 1949 crop of sweetpotatoes is substantially complete, and market supplies will be seasonally very small till the new crop becomes available this summer. Retail prices of sweetpotatoes in large urban areas for the first 3 months of the year averaged about 5 percent lower than in the comparable period in 1949.

Reports on farmers' planting intentions indicate that moderately more acreage will be planted to sweetpotatoes this year than last. If these intentions materialize and if yields by States are comparable with the 1944-48 average yields, the sweetpotato crop would be slightly larger than in 1949, though still below the recent 10-year (1939-48) average. In that event, the retail price for sweetpotatoes during the 1950-51 marketing year would be moderately lower and U. S. civilian consumption of this commodity probably would be somewhat higher than in the preceding marketing year.

Supplies of dry edible beans in the 1949-50 marketing year have been considerably in excess of demand at prevailing prices. The 1949 crop was the largest on record, and with military purchases and exports during the latter part of 1949 low in comparison with those in the comparable period of the immediate postwar years, the carry-over stocks of beans on January 1, 1950 were very large. Indications are that in the remainder of 1949-50 marketing year the non-civilian takings are likely to continue relatively small, and the U. S. Department of Agriculture acquisitions of 1949 crop dry edible beans under the price support program probably will be large. U. S. civilian per capita consumption of dry edible beans in calendar year 1950 is expected to be substantially larger than in the preceding year, in response to lower retail prices. Retail prices of navy beans in leading cities from January to March 1950 averaged 15.0 cents per pound, almost 12 percent lower than for the same months last year.

Reports received in March on farmers' crop planting intentions in 1950 indicate a probable acreage in dry edible beans which, with 1945-49 average yields by States, would produce about 15 million bags (100 pounds each, cleaned basis), approximately one-fourth less than the record 1949 crop of more than 20 million bags. The 1950 crop will be the first one for which the price support for dry edible beans will be tied to an acreage allotment.

The 1949 crop of dry field peas was smaller than that of the preceding year. Despite this, with the prospective export demand much smaller than in the 1948-49 marketing year, supplies of peas are likely to be much larger than domestic demand at prevailing prices. Indications are that this surplus supply problem may be carried over into the 1950-51 marketing year since farmers' March 1 intentions to plant point to an acreage only slightly lower in 1950 than a year earlier. If planting intentions are carried out, and if yields equal the 1944-48 average for the 9 producing States, production would be about 3 1/2 million bags (100 pounds each, uncleaned basis), which is slightly more than the 1949 crop. There will be no Government support prices applicable to dry field peas from the 1950 crop.

Food Grains

Supplies of wheat, rye, and rice, present and in prospect from the 1950 crops, are more than ample to meet domestic needs for food and nonfood uses as well as export demand. On a per capita basis, U. S. civilians are expected to continue to use for food about the same quantities of these grains as well as corn, oats, and barley as in the past year or so.

Total disappearance of wheat for the year ending June 30, 1950 is expected to be about 1,000 million bushels. Domestic use may total about 700 million, with 482 million for civilian food and the remainder for the armed forces and nonfood purposes. Exports and shipments to territories during July 1949-March 1950 totaled about 240 million bushels, including flour in equivalent terms. If exports and shipments during the remainder of the crop year are at the same rate as in the past 9 months, the total for the year would be about 310 million bushels, substantially below the 500 million shipped out in 1948-49 but still considerably above the prewar average. This would leave a carry-over on July 1, 1950 of about 450 million bushels compared with 307 million a year earlier.

Wheat prospects again point to a 1950 crop that will be larger than prospective domestic disappearance and exports, unless growing conditions from now to the harvesting season are below average. Wheat prices will fall below the loan rate following harvest which gets underway in June, but should average close to it for the 1950-51 marketing year as a whole. The average loan rate probably will be slightly below 1949, when it was $1.95 on a national farm basis.

A winter wheat crop of 764 million bushels was indicated as of April 1. Production of spring wheat has not yet been estimated; the first official estimate will be released June 9. However, if yields per seeded acre should equal the 1944-48 average by States on the acreage indicated by farmers' March intentions, about 300 million bushels will be produced. A spring wheat crop of this size, would result in a total wheat crop of 1,064 million bushels in 1950. With anticipated domestic use of about 700 million bushels for food and nonfood purposes, a crop of this size, together with a prospective carry-over of about 450 million bushels at the beginning of the year, would provide about 814 million bushels for export in 1950-51 and for carry-over July 1, 1951. If exports in 1950-51 are no larger than in 1949-50, about 500 million bushels would remain as carry-over stocks on July 1, 1951. A carry-over of this size would be about one-fifth lower than the record carry-over of 631 million bushels in 1942, but substantially above the prewar (1932-41) average of 235 million.

Civilian consumption of wheat products in the United States on a per capita basis for the calendar year 1949 was 193 pounds (grain equivalent basis), approximately the same as a year earlier, but considerably below the average of 220 pounds in the prewar years, 1935-39. The retail price of white bread in large cities in 1949 was slightly higher than the average of 13.9 cents per pound in 1948 and that of wheat flour about 2 percent lower, according to the Bureau of Labor Statistics. For the 1950 year as a whole, little change is expected in flour and bread prices.

Rye supplies for 1949-50, which include a carry-in stock of 8.3 million bushels at the beginning of the year, production of 18.7 million and imports which may amount to about 9.0 million bushels, will total 36.0 million bushels. This will be about the same as supplies in 1948-49, but considerably under the average of 57.2 million for the crop years 1938-39 to 1947-48. Imports in July 1949-February 1950 totaled 7.5 million bushels. Recent imports have been small, but the total for the year is estimated 8-10 million bushels, the largest since 1943-44. Indications are that domestic food use of rye in 1949-50 will be about the same as the 4.7 million bushels in 1948-49, which was 30 percent below the prewar (1935-36 to 1939-40) average of 6.7 million bushels. The amount of rye used for food declined from 1943-44 to 1946-47, but has since remained at about the same level. Feed use in 1949-50 probably will be about 7.0 million bushels, the same as estimated for 1948-49. With an increase in acreage of about 12 percent seed use will be about 5.0 million bushels. The quantity used in the production of alcohol and spirits in the period July 1949-February 1950 was only 2.9 million bushels, compared with 4.9 million in the same period a year earlier. In 1949-50 the amount of rye thus utilized may not exceed 5.0 million bushels, about one-fourth lower than in 1948-49. Exports from July 1949 through March 1950 totaled about 4 1/2 million bushels. On the basis of those disappearance figures, the carry-over July 1, 1950 may be about 9 million bushels compared with 8.3 million a year earlier, but this will depend upon imports and exports in the April-June period.

Condition of the 1950 rye crop as of April 1 was reported at 85 percent of normal compared with 89 percent a year earlier. With a 12 percent increase in total rye acreage reported, however, the quantity of rye which will be harvested for grain is expected to exceed the 1949 crop of 18.7 million bushels, and provide ample rye supplies for another year.

United States supplies of rice for the 1949-50 season, in terms of milled grain, totaled 27.4 million 100-pound bags, a new record high. Old-crop stocks at the beginning of the year were only about 1 million bags, but the all-time record crop of 1949 totaled 26.4 million bags. Civilian food use from the 1949 crop may be about the same as the 8.4 million bags consumed in the preceding year. This would be 5.7 pounds per capita, almost a pound above the 1947-48 rate but about equal to the prewar (1935-39) average. Non-food uses are expected to be about the same as those in 1948-49, as are shipments to Territories that totaled 3.3 million bags in 1948-49. Exports are expected to be larger than in 1948-49 when they reached a near record high of 8.8 million bags. Because of the exceptionally large crop in 1949, even though disappearance is at very high levels, the year-end carry-over stock is expected to be substantially larger than at the beginning.

In 1950, for the first time since 1944, the planted acreage of rice will be smaller than that of the preceding year. The prospective acreage is estimated at 1.64 million acres, about 10 percent less than number of acres sown in 1949, but slightly above the acreage allotment total. If yields per acre should equal the 1944-48 average, by States, and the indicated seedings materialize, the 1950 rice production will amount to about 75 1/2 million bushels, equivalent to about 22 million bags of milled rice. This would be nearly 15 percent less than the 1949 outturn.

Supplies of corn, oats and barley for the first half of 1950 are ample for domestic requirements and exports. Stocks remaining on April 1 were slightly larger than the previous April 1 record stocks of a year earlier, and were 43 percent above the 1943-47 average for that date. As compared with a year ago, however, a larger percentage of these grains were under loan or owned by the Government. During the first quarter of 1950, domestic disappearance of these grains for all uses was only slightly larger than a year earlier. Domestic use may be little if any larger in the first half of 1950 than in the first half of 1949. Another big carry-over is in prospect at the close of the current season -- probably larger than the record carry-over last year.

Supplies in 1950-51 will again be adequate for domestic requirements if the 1950 growing season is average or better. If yields equal the 1944-48 average on the acreages farmers intended to plant as of March 1, larger crops of oats and barley, but a considerably smaller corn crop would be grown. The total production of the three grains would be about 10 percent smaller than in 1949. The considerably smaller supply of corn in prospect in the last half of 1950, excluding corn under price support, would be a price supporting factor for corn in the last half of the year.

Processing of corn during October-March this season by the wet processing industry was at about the same rate as in 1948-49. Wholesale prices of corn products have been relatively stable since the beginning of 1950 and generally are a little higher than the last quarter of 1949. In the first quarter of this year the price of corn meal averaged a little lower than in that quarter of 1949, while prices of cornstarch, sugar and syrup were all higher. Prices of these products may average a little higher during the remainder of 1950 than in the same period of 1949 in view of the prospective smaller supplies of corn available on the market.

Supplies of oats are fully adequate for domestic food requirements until the 1950 crop is produced. Although supplies of barley are somewhat smaller than a year ago and a larger proportion is under price support, food needs will be met by market supplies or by withdrawals from stocks. Average prices received by farmers for both oats and barley have advanced above price support levels in recent months and are higher than a year ago. Prices of oatmeal and malt in April were slightly higher than in that month of 1949 and may continue higher during the next few months.

Exports of feed grains in the early months of 1950 have been running smaller than in the corresponding months of 1949. Exports of corn during the calendar year 1950 may total somewhere near the large export of 132 million bushels last year, but smaller exports of oats and barley are in prospect.

Sugar

In January-March 1950 total deliveries of sugar by primary distributors for domestic consumption were about 4 percent less than in the first quarter of 1949. This slight reduction was largely due to the decline in deliveries during January, since distribution in both February and March was greater than in the same months last year. Based on these deliveries, it is probable that sugar consumption per person so far this year has not been greatly different than last year. Retail prices of sugar in the U. S. during the first quarter of this year averaged slightly more than 9 1/2 cents per pound as compared with slightly less than 9 1/2 cents a year earlier. During the second quarter, deliveries for distribution are likely to be seasonally heavier.

Prospective sugar beet acreage for 1950 is indicated at 980 thousand acres, up 27 percent from 1949. If 5-year average yields per planted acre are attained, about 11.5 million tons of sugar beets would be harvested, compared with 10.2 in 1949. Such an increase in output, however, will have little effect on total supplies available to consumers this year since beets from the 1950 crop will not be sent to processors until late in the year. Production of sugar from domestic beets has not been large enough since the Sugar Act of 1948 went into effect to fill the basic quota of 1,800 thousand short tons (raw value) provided under the Act. As a result, a portion of the domestic quota has been reallocated to offshore suppliers.

The total of 7,500 thousand short tons (raw value) determined by the Secretary of Agriculture to be the sugar requirement of consumers in the continental United States for 1950 is the same as the final determination for 1949. On this basis, total supplies in 1950 would not be much different for the year as a whole, and civilian per capita consumption in 1950 probably would be about the same as the 95.5 pounds in 1949. Prices at retail probably will average about the same. Deliveries for export, which declined about 28 percent from 1948 to 1949, may be slightly lower in 1950 than last year.

Total stocks of sugar on January 1, 1950 were slightly larger than those a year earlier. Holdings of primary distributors, at 1,708,141 tons, were 14 percent greater than last January 1, but indications are that "invisible" holdings were down (as indicated by the reports of 759 retailers, wholesalers and industrial users who reported for both dates).

Table 5.- Planted acreage of major crops, 1935-39 average, 1949, prospective plantings for 1950, with percentage comparisons

Crop	Planted acreage		Prospective plantings 1950 1/	Prospective 1950 as percentage of	
	1935-39	1949		1935-39	1949
	1,000 acres	1,000 acres	1,000 acres	Percent	Percent
Total 2/	326,679	340,768	334,660	102	98
Corn, all	97,044	87,910	82,765	85	94
Wheat, all	73,236	84,931	72,750	99	86
Winter	51,577	62,372	53,023	103	85
Spring, all	21,659	22,559	19,727	91	87
Oats	40,591	44,525	47,964	118	108
Barley	13,365	11,208	13,879	104	124
Flaxseed	1,938	5,199	4,027	208	77
Rice	1,007	1,839	1,645	163	89
All sorghums	15,254	11,754	*14,568	96	124
Sorghums, all excl. sirups	15,029	11,665	14,478	96	124
Potatoes	3,123	1,924	1,862	60	97
Sweetpotatoes	804	548	603	75	110
Tobacco 3/	1,647	1,626	1,582	96	97
Beans, dry edible	1,917	1,900	1,678	88	88
Peas, dry field	281	367	281	100	77
Soybeans for beans 3/	3,042	9,912	4/11,733	386	118
Soybeans, grown alone 5/	7,262	11,409	13,500	186	118
Cowpeas, grown alone 5/	3,165	1,177	1,192	38	101
Peanuts, picked and threshed 3/	1,659	2,433	6/2,150	130	88
Peanuts, grown alone 5/	2,173	2,929	2,570	118	88
Hay, all 3/	67,940	72,835	75,091	111	103
Sugar beets	891	769	980	110	127

1/ From March 1950 Prospective Plantings Report and December 20, 1949 Winter Wheat and Rye Report.
2/ Includes all wheat soybeans for beans, peanuts picked and threshed, and sorghums all excluding sirup.
3/ Harvested acreage.
4/ 1950 indicated solid equivalent acreage adjusted for the percentage harvested for beans by using the 1948-49 average percentages, by States.
5/ For all purposes.
6/ Assuming the usual relationship of acreages planted alone to acreages for picking and threshing, by States.

* All sorghum acreage (B.A.E. Prospective Plantings Report) less 1949 acreage harvested for sirup.

Table 6.- Prospective and actual acreages planted in major crops, 1947-49, with percentage comparisons 1/

Crop	1947			1948			1949		
	Prospective	Actual	As percentage of prospective	Prospective	Actual	As percentage of prospective	Prospective	Actual	As percentage of prospective
	1,000 acres	1,000 acres	Percent	1,000 acres	1,000 acres	Percent	1,000 acres	1,000 acres	Percent
Total	284,295	279,810	98	281,673	282,620	100	276,366	280,478	101
Corn, all	87,599	86,108	98	86,131	86,828	101	84,809	87,910	104
Spring wheat	19,280	20,036	104	19,789	20,053	101	20,300	22,559	111
Oats	46,620	42,301	91	45,709	44,526	97	44,506	44,525	100
Barley	11,714	12,102	103	12,660	13,228	104	11,885	11,208	94
Flaxseed	4,488	4,161	93	4,401	5,001	114	4,713	5,199	110
Rice	1,619	1,703	105	1,666	1,802	108	1,753	1,839	105
All sorghums	13,109	11,746	90	12,983	13,804	106	12,144	11,754	97
Potatoes	2,310	2,136	92	2,162	2,137	99	1,980	1,924	97
Sweetpotatoes	664	611	92	560	521	93	489	548	112
Tobacco 2/	1,908	1,853	97	1,528	1,554	102	1,596	1,626	102
Beans, dry edible	1,889	1,839	97	1,811	1,970	109	1,834	1,900	104
Peas, dry field	589	551	94	470	309	66	409	367	90
Soybeans 3/	12,213	12,956	106	11,659	11,843	102	11,278	11,409	101
Cowpeas 3/	1,116	1,138	102	1,039	1,117	108	1,011	1,177	116
Peanuts 3/	3,847	4,112	107	3,988	3,920	98	3,175	2,929	92
All hay 2/	4/ 74,337	75,489	102	4/ 74,215	73,208	99	4/ 73,718	72,835	99
Sugar beets	993	968	97	902	799	89	766	769	100

1/ Based on the prospective planted acreages indicated by farmers' reported March 1 intentions.
2/ Acreage harvested.
3/ Grown alone for all purposes. Partly duplicated in hay acreage.
4/ Includes wild hay harvested in 22 Western States, to be comparable with actual acreage data.

Table 7.- Production of major food commodities, calendar years, 1935-39 average, 1947, 1948, 1949, and preliminary indications for 1950 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1947	1948	1949	Preliminary indications for 1950 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Meats (carcass weight)								
Beef	Mil.lb.	6,937	10,428	9,181	9,539	9,490	137	99
Veal	Mil.lb.	1,038	1,599	1,419	1,323	1,330	128	101
Lamb and mutton	Mil.lb.	870	802	753	605	570	66	94
Pork (excluding lard)	Mil.lb.	7,337	10,601	10,246	10,412	10,980	150	105
Total meats		16,182	23,430	21,599	21,879	22,370	138	102
Fish (edible weight)								
Fresh and frozen	Mil.lb.	615	754	760	3/	3/	--	--
Canned 4/	Mil.lb.	337	454	485	3/	3/	--	--
Cured	Mil.lb.	74	63	63	3/	3/	--	--
Total fish	Mil.lb.	1,026	1,271	1,308	3/	3/	--	--
Poultry and eggs								
Eggs	Mil.doz.	3,335	5,065	5,056	5,168	5,400	162	104
Chicken (dr.wt.)	Mil.lb.	2,327	3,497	3,284	3,857	3,700	159	96
Turkey (dr.wt.)	Mil.lb.	350	606	505	699	725	207	104
Dairy products								
Total milk 5/	Mil.lb.	106,450	121,891	118,353	121,962	124,800	117	102
Cheese 6/	Mil.lb.	669	1,183	1,094	1,193	1,210	181	101
Cond. and evap. milk	Mil.lb.	2,225	3,630	3,778	3,154	3,375	152	107
Fats and oils								
Butter, farm & factory (actual weight)	Mil.lb.	2,170	1,645	1,509	1,692	1,825	84	108
Lard 7/	Mil.lb.	1,630	2,427	2,368	2,594	2,750	169	106
Margarine (fat content)	Mil.lb.	303	606	735	696)			
Shortening	Mil.lb.	1,529	1,374	1,441	1,483)	3,810	158	94
Other edible fats and oils 8/	Mil.lb.	575	1,070	1,281	1,892)			
Total fats and oils 9/	Mil.lb.	6,207	7,122	7,334	8,357	8,385	135	100
Fruits								
Fresh:								
Citrus	Mil.lb.	6,875	9,992	8,681	7,658	6,950	101	91
Apples (commercial)	Mil.lb.	4,385	3,948	3,275	4,400)	9,000	99	91
Other (excl. melons)	Mil.lb.	4,703	5,521	4,506	5,442)			
Processed:								
Canned fruit	Mil.lb.	1,705	2,643	2,511	2,511	2,400	141	96
Canned fruit juices	Mil.lb.	333	2,151	2,536	2,137	1,910	574	89
Frozen	Mil.lb.	106	353	400	484	600	566	124
Dried	Mil.lb.	1,118	1,151	890	1,005	3/	--	--

- Continued

Table 7.- Production of major food commodities, calendar years, 1935-39 average, 1947, 1948, 1949, and preliminary indications for 1950 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1947	1948	1949	Preliminary indications for 1950 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Vegetables								
Fresh 10/	Mil.lb.	30,520	36,088	38,511	37,396	38,500	126	103
Canned 11/	Mil.lb.	4,030	6,130	5,824	6,026	6,100	151	101
Frozen	Mil.lb.	12/ 78	346	446	564	550	705	98
Potatoes	Mil.bu.	355	389	455	402	389	110	97
Sweetpotatoes	Mil.bu.	68	56	50	54	57	84	106
Dry edible beans 13/	Mil.lb.	1,360	1,604	1,954	2,006	1,500	110	75
Canned baby foods	Mil.lb.	48	368	527	520	545	1135	105
Sugar, raw basis	1,000 sh.tons	1,948	2,158	1,917	2,112	2,250	116	107
Grains								
Wheat	Mil.bu.	759	1,367	1,314	1,146	1,064	140	93
Rye	Mil.bu.	44.9	26.0	26.4	18.7	22.0	49	118
Rice, milled	Mil.lb.	1,340	2,189	2,290	2,503	1/2,640	197	105
Corn, grain only	Mil.bu.	2,050	2,137	3,402	3,109	2,600	127	84
Oats	Mil.bu.	1,045	1,199	1,493	1,323	1,500	144	113
Barley	Mil.bu.	239	281	316	238	319	133	134
Peanuts, farmers' stock basis	Mil.lb.	1,229	2,183	2,338	1,853	3/	--	--

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Preliminary indications based on trends in livestock numbers, current or prospective rates of output, average or probable acreages and yields, and such other data or advance estimated as are available. These estimates are only used to indicate the general level of food supplies for domestic consumption for 1950, but they are based on such official estimates of production as are available at this time. Revisions will of course be made from time to time throughout the year as official indications or estimates are issued through the Crop Reporting Service of the Department. 3/ Not available. 4/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 5/ Includes total farm production of milk and off-farm production. 6/ Excluding full skim, cottage, pot and bakers' cheese. 7/ Including amount used in manufactured food and nonfood products. 8/ Represents fats used in cooking and salad oils, salad dressing mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 8.- Retail food prices and total consumer price index, United States, 1940-47 and 1948-50 by months

(Index numbers 1935-39=100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	223	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	108	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949	233	201	187	148	170	219	153	227	176	221	202	169
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170
July	236	204	182	141	170	221	154	228	176	208	202	168
Aug.	240	222	185	144	169	211	150	230	176	209	203	169
Sept.	244	233	185	148	170	209	148	230	177	211	204	170
Oct.	235	228	187	144	169	202	147	228	178	214	201	168
Nov.	229	208	186	140	169	213	146	225	179	265	201	169
Dec.	223	178	186	137	169	208	145	224	179	292	197	168
1950												
Jan.	219	152	184	135	169	217	143	224	179	300	196	167
Feb.	222	141	184	134	169	210	143	222	178	304	195	166
Mar.	227	150	182	134	169	205	143	222	177	312	196	167

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-53 BAE JULY - SEPTEMBER 1950

Approved by the Outlook and Situation Board, July 20, 1950

SUMMARY

Supplies of food available to civilians in the United States are expected to continue at about the same high level as in the past 2 years. Even if the Korean situation results in some increase in military procurement of food in coming months, supplies available for civilians would not be noticeably affected.

Production of food this year is expected to total about the same as in 1949, 38 percent more than the 1935-39 average and 20 percent above 1941. Stocks of most foods which can be stored are fairly substantial. Furthermore, exports of food have been and are expected to continue smaller than during the past several years. On the basis of these supply estimates, civilian consumption of food per person this year is expected to average 11 percent higher than the 1935-39 average and a little above 1941, the record year before World War II.

Overall demand for food has strengthened this spring and summer along with the general rise in economic activity. The principal effect of the Korean situation on the food outlook for the next six months is likely to be the strengthening of consumer demand as employment and consumer incomes rise with the impact of an accelerated defense program. Through the first half of this year, military procurement of most foods for troop use and civilian feeding in occupied areas was at a lower level than in the same period of 1949. Although mobilization will be stepped up, military purchases are not expected to have a substantial effect on the overall demand for food products this year.

Prospects for food supplies and consumer and military demand point to slightly higher retail prices for food, but in the next 5 months prices are not likely to go more than 3 or 4 percent above the July level. There has apparently been some speculative buying and price increases in food in recent weeks substantially similar to those occurring in 1939, which receded as soon as consumers realized that food supplies were adequate. The current food supply situation is again such that speculative buying and price increases are not warranted.

The supply situation for most livestock products is at least as favorable as last year and somewhat better than in the years before World War II. Although current indications are that both the wheat and corn crops may be about 200 million bushels short of 1949 crops, carryover stocks are very large and supplies of cereal food products for the coming year will be plentiful. Fruit crops are smaller than last year, largely due to unfavorable weather last winter for citrus and this spring for peach and pear crops, in particular. However, fairly large stocks of processed fruits and vegetables are available from the 1949 packs and the 1950 packs probably will be about equal to last year's.

Although the general level of food consumption per capita is expected to continue about the same as in 1949, for the year as a whole there may be some increase in the consumption of pork, poultry and eggs, frozen vegetables, sweetpotatoes, vegetable oil products and sugar. On the other hand, the consumption of beef and veal, fresh fruits and butter may be down slightly.

The increase in overall food consumption per person from the 1935-39 average level has resulted principally from higher consumption of livestock products except butter, processed fruits and vegetables, and vegetable oils. These increases have more than counter-balanced lower consumption rates for potatoes and sweetpotatoes, butter, fresh fruits, wheat and rye flour, and corn meal. Similarly, food consumption in 1950 is expected to average a little above 1941, the record prewar year, because of minor increases in dairy products and fats and oils except butter, and substantial increases in the consumption of poultry and eggs, canned and frozen fruit juices, frozen fruits and vegetables. The average rates of consumption of some foods in 1950 may be lower than in 1941 -- particularly canned fish, fresh fruits, potatoes and sweetpotatoes, sugar, wheat flour, and corn meal.

The current rates of food consumption per capita are somewhat lower than those attained at the end of the war, chiefly due to declines in the consumption of fluid milk and cream, ice cream, meats, fresh and processed fruits and vegetables. However, feed supplies are plentiful so hogs could be fed to heavier weights and the production of grain fed beef increased. The number of cattle on feed on July 1 in 11 Corn Belt States was 34 percent greater than a year earlier. The current dairy situation is such that increased supplies of fluid milk could be marketed upon demand. Similarly the packs of some canned fruits and vegetables could still be increased to meet stronger demand.

On the basis of present indications of food supplies and consumer demand, retail food prices in 1950 are expected to average about the same as last year. Lower prices this year of such foods as poultry and eggs, potatoes, and fats and oils except butter may about offset possible increases from 1949 in the annual average price of meats, fresh fruits, corn products, and processed fruits.

Table 1.--Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1941, 1944-49 and preliminary estimates for 1950, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1941	1944	1945	1946	1947	1948	1949	1950 Prel.	1950 as a percentage of 1949
Food grains 2/	131	148	155	164	197	189	166	135	81
Truck crops 3/	116	137	142	158	141	144	144	147	102
Fruits and nuts 4/	113	123	113	133	126	115	121	121	100
Vegetables, excluding truck crops 5/	100	106	110	128	107	124	114	108	95
Sugar crops 6/	97	81	94	103	110	89	99	113	114
Total food crops 7/	116	129	130	145	147	144	136	126	93
Meat animals 8/	117	155	147	145	145	134	139	143	103
Poultry 9/	120	166	170	160	157	153	169	178	105
Dairy products 10/	110	115	119	119	117	114	117	119	102
Total food livestock	115	144	142	139	138	131	138	142	103
Food production	115	140	139	140	140	134	137	138	101
Agricultural production, food and non-food	113	137	134	137	136	138	140	137	98
Civilian per capita food consumption	109	112	114	119	115	111	111	111	100

1/ Production estimates are based on preliminary crop indications as of July 1, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1950.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includss truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watsrmelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pscans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1950 1/

Year	Total food utilization	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Distribution: Civilian	Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.1	.1		91.4	4/ 3.5	2.1	2.2	.1		3.0
1949	100.0	95.3	5.2		.5	91.2	4/ 3.3	2.2	1.6		.6	3.3
1950 Prel.	100.0	95.0	5.0	-		92.1	4/5/2.4	2.2	1.3		.9	3.3
Section b. Percentage of 1935-39 food utilization												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.6	.6		1.6
1945	136.4	130.5	6.5		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.8	125.8	6.9	.1		121.4	4/ 4.7	2.7	2.8	.1		4.0
1949	134.9	128.7	6.9		.7	123.2	4/ 4.4	2.9	2.2		.7	4.5
1950 Prel.	136.4	129.6	6.8	-		125.6	4/5/3.3	3.0	1.8		1.2	4.5

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for land-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces. 5/ Excludes grain products and some other foods for civilian feeding in Germany, formerly purchased by the Army but procured through commercial channels in 1950. This shift accounts for a substantial part of the apparent reduction in military takings from 1949 to 1950.

RETAIL FOOD PRICES

Retail food prices in 56 large cities during January-May 1950 averaged almost 3 percent lower than for the same months of last year, according to the Bureau of Labor Statistics. Declines from the early part of 1949 were reported for all commodities except beverages and sugar, with the largest reduction occurring for eggs, fruits and vegetables, and food fats and oils. Food prices dropped noticeably from September 1949 to February 1950, but with increases in prices of meats, fats and oils, and fresh and dried vegetables this spring and early summer, the index of retail food prices had increased about 3 percent above the February level by May. Some further price increases occurred in June and July. With strong consumer demand for food in prospect, retail prices in the next 5 months may increase slightly, but they are not likely to go more than 3 or 4 percent above the July level. Accordingly, retail food prices for the year 1950 may average close to the 1949 level.

The current strong consumer demand for some foods, such as meat, results in large part from the record level of employment and the high level of disposable personal income. This year, the demand for food is much higher than in prewar years and even above the record prewar year 1941. Consumer disposable income per person for 1950 is currently estimated at about $1,300 compared with $686 in 1941 and an average of $510 for 1935-39. A larger proportion of disposable income has been spent for food in retail stores and public eating places in recent years than before World War II. Preliminary indications are that food expenditures this year may average $335 per person (26 percent of disposable income) as against the average $119 per person (23 percent of disposable income) for 1935-39 and $150 per person (22 percent of disposable income) in 1941. The accelerated defense program proposed by the President on July 19 will strengthen the demand for and the production of goods and services in this country. This will affect food prices mainly through the effect of increased employment and consumer incomes on consumer demand.

Some seasonal declines in the retail prices of meat and other foods generally occur in the latter part of the year as production of these commodities reaches the annual peak level. However, with strong consumer demand, the seasonal price decline for such foods as meats, fresh fruits, and fats and oils may be less than usual this year.

It appears doubtful that exports and military takings from the total food supply will have any more effect on food prices in 1950 than last year. Current indications are that such takings will total about the same as in 1950. Furthermore, the Department of Agriculture has substantial stocks of some foods purchased under price support programs which could be made available to the armed forces. Food exports from the United States which were at record levels in recent years will be somewhat smaller this year. As in recent years, most of the food exported will be grains and grain products. The decline in the export demand for U. S. food results from improved food production abroad and from the increased availability of supplies from other surplus food producing countries.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1941, 1947-49, and preliminary estimates for 1950 with percentage comparisons 1/

(Primary distribution weight)

Commodity	Average 1935-39	1941	1947	1948	1949	1950 Prel.	1950 as a percentage of 1935-39	1950 as a percentage of 1949
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Percent	Percent
Meats (carcass weight) - Total	126.2	142.8	155.0	145.4	143.9	144	114	100
Beef	55.2	60.5	69.1	62.6	63.5	62	112	98
Veal	8.1	7.6	10.7	9.4	8.7	8	99	92
Lamb and mutton	6.8	6.8	5.4	5.0	4.1	4	59	98
Pork (excluding lard)	56.1	67.9	69.8	68.4	67.6	70	125	104
Fish (edible weight) - Total	11.1	11.8	10.6	11.1	11.0	11.2	101	102
Fresh and frozen	5.3	6.3	6.2	6.3	6.2	2/	-	-
Canned 3/	4.8	4.7	3.6	3.9)	4.8	2/	-	-
Cured	1.0	.8	.8	.9)				
Poultry products								
Eggs 4/	37.3	38.9	47.4	48.2	47.0	47.7	128	101
Chicken (dressed weight)	17.9	20.5	23.6	23.1	25.2	26.1	146	104
Turkey (dressed weight)	2.6	3.5	4.5	3.6	4.1	4.8	185	117
Dairy products								
Total milk (whole milk equivalent)	801	808	787	750	760	749	94	99
Cheese	5.5	5.9	6.9	6.8	7.2	7.2	131	100
Condensed and evaporated milk	16.7	18.4	20.2	20.2	19.9	19.8	119	99
Fluid milk and cream	340	352	398	387	385	385	113	100
Fats and oils - Total, fat content 5/	44.7	47.4	42.0	42.7	43.1	43.7	98	101
Butter, farm and factory (actual weight)	16.7	16.0	11.2	10.0	10.5	10.2	61	97
Lard	11.0	13.7	12.7	12.9	11.8	11.9	108	101
Margarine (actual weight)	2.9	2.7	5.0	6.1	5.7	6.1	210	107
Shortening	11.7	10.3	9.3	9.6	9.6	10.0	85	104
Other edible fats and oils	6.3	8.3	6.9	7.2	8.6	8.6	137	100
Fruits								
Fresh - total	138.5	148.5	143.5	130.6	124.9	116.3	84	93
Citrus	48.9	57.4	61.8	53.9	47.3	42.0	86	89
Apples (Commercial)	30.4	31.5	25.3	25.8	24.8	25.6	84	103
Other (excluding melons)	59.2	59.6	56.4	50.9	52.8	48.7	82	92
Processed								
Canned fruit	14.9	17.8	18.2	18.0	17.5	17.7	119	101
Canned juices	3.9	8.5	15.5	17.9	15.5	13.5	346	87
Frozen	.8	1.3	3.2	3.0	3.5	3.9	488	111
Dried	5.8	4.1	4.3	4.2	4.2	4.2	72	100
Vegetables								
Fresh	235	242	252	261	251	248	106	99
Canned	29.9	37.1	40.0	36.8	38.3	38.5	129	101
Frozen	6/ .4	.7	2.6	3.0	3.0	3.3	825	110
Potatoes	131	129	124	112	108	109	83	101
Sweetpotatoes	21.4	18.3	15.9	13.0	13.9	14.3	67	103
Dry edible beans	8.8	8.8	6.4	6.8	7.0	8.7	99	124
Sugar, refined	97.0	103.7	91.2	95.7	95.5	7/96	99	101
Grains								
Corn products:								
Corn meal	22.9	20.5	14.0	13.8	13.5	13.5	59	100
Corn sirup	7.6	8.5	12.8	8.2	8.5	8.5	112	100
Corn starch	1.3	1.5	1.9	1.7	1.8	1.8	138	100
Corn sugar	2.7	4.0	4.5	4.0	4.1	4.3	159	105
Breakfast cereals	1.6	2.3	1.4	1.5	1.5	1.5	94	100
Hominy	1.4	1.9	3.1	2.9	2.7	2.7	193	100
Oatmeal	3.9	4.0	2.8	2.9	2.9	2.9	74	100
Barley food products 8/	1.4	1.3	1.9	1.5	1.5	1.5	107	100
Wheat:								
Flour 9/	159	155	138	137	138	138	87	100
Breakfast cereals	3.7	3.8	3.3	3.3	3.3	3.3	89	100
Rye flour	2.2	2.2	1.3	1.4	1.4	1.4	64	100
Rice, milled	5.6	5.8	5.8	4.8	5.7	6.0	107	105
Beverages								
Coffee 10/	14.0	15.8	17.3	18.2	18.6	17	121	91
Tea	.67	.78	.58	.56	.59	.6	90	102
Cocoa beans	4.4	4.7	4.1	3.8	4.1	4.2	95	102
Peanuts (shelled)	4.3	4.7	4.7	4.4	4.5	4.5	105	100

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for under-enumeration of children under 5 and for military personnel not eating out of civilian supplies. 1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 311 in 1941, 379 in 1947, 386 in 1948, 376 in 1949 and 381 estimated for 1950. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ Based on the U. S. consumers' requirement of 7.85 million short tons (raw value) as determined by the Secretary of Agriculture. 8/ All barley food products in terms of malt equivalent. 9/ Includes white, whole wheat, and Semolina flour. 10/ Green bean basis.

NUTRITIONAL REVIEW 1/

The supplies of major nutrients available for consumption in 1950 are expected to be substantially the same as in the past two years. Accordingly, diets of the U. S. population are somewhat better than in the years before World War II due in large part to the increased consumption of fluid milk, meats, eggs, leafy green and yellow vegetables and citrus fruits.

Carbohydrate, fat and protein all contribute calories. While the number of calories available from the food supply in 1950 is about the same as in 1935-39, the average amount of carbohydrate in our diet has decreased slightly while fat has increased. This results principally from the decline in the consumption of grains and potatoes and increases in vegetable oils products and in foods containing fat such as pork and dairy products, excluding butter.

Although the available supply of protein is less than in 1946, the peak year for most nutrients, it is still about equal to the quantities available for the years 1940 to 1942 and about 6 percent above the 1935-39 average.

Since 1942 the average amount of calcium in the food supply has been 1.0 or more grams per capita per day. The calcium available from the food supply is down from the post war peak of 1946, largely due to a decrease in fluid milk consumption.

The iron available from the food supply in 1950 is lower than during the years 1944 to 1947 because of a decrease in the consumption of grain products and sirups and molasses as well as a slight drop in the consumption of meats. The available supply of this nutrient, however, is still 21 percent above the 1935-39 average and 15 percent higher than in 1941.

The quantities of vitamin A available for consumption are lower than in the peak years 1945 and 1946 but still 6 percent above 1935-39. Thiamine, riboflavin and niacin have made great gains since the prewar years due largely to the enrichment of grain products. Such enrichment first became an important factor in 1943. The supplies of these vitamins available from the 1950 food supply are 25 to 33 percent above the prewar levels.

The short citrus crop of last winter is reflected in a slight decrease in the available supply of ascorbic acid for 1950 compared with 1949. However, it is still almost 4 percent above the 1935-39 average. With a larger citrus crop in prospect, it is expected that the supply of ascorbic acid available during the coming winter will be greater than a year earlier.

1/ Prepared by the Bureau of Human Nutrition and Home Economics.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1941, 1947 to 1949 and preliminary indications for 1950, with percentage comparisons 1/

Nutrients	Units	Aver-age 1935-39	1941	1947	1948	1949	1950 Prel.	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Food energy	Cal.	3,240	3,400	3,350	3,250	3,240	3,250	100	100
Protein	Grams	89	94	98	94	93	94	106	101
Fat	Grams	131	144	144	139	141	143	109	101
Carbohydrate	Grams	429	439	420	403	401	399	93	100
Calcium	Grams	.92	.98	1.08	1.04	1.04	1.03	112	99
Iron	Mg.	14.0	14.8	18.1	16.7	16.9	17.0	121	101
Vitamin A value	I.U.	8,100	8,300	8,800	8,600	8,500	8,600	106	101
Thiamine	Mg.	1.55	1.78	2.13	2.05	2.03	2.06	133	101
Riboflavin	Mg.	1.88	2.00	2.46	2.36	2.35	2.35	125	100
Niacin	Mg.	15.5	17.1	20.7	19.2	19.2	19.7	127	103
Ascorbic acid	Mg.	114	122	130	125	120	118	104	98

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for 1947-50 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour.

COMMODITY REVIEWS

Meats

Meat consumption per person for 1950 as a whole is expected to be about the same as the 144 pounds consumed in 1949. This would approximately equal to the rate of consumption in 1941, but well above the 1935-39 average of 126 pounds. The highest rate of meat consumption in recent years was 155 pounds per person in 1947.

Although total meat consumption will not change much this year, a little more pork and less of other kinds of meats will be consumed than in 1949. Per capita consumption in 1950 will be larger than in 1941 for all kinds of meat except lamb and mutton which will be approximately three pounds per person less.

Total meat output in 1950 probably will be slightly larger than in 1948 or in 1949. Pork production is expected to be somewhat greater than in the past few years, or in the years before World War II. The quantity of pork produced in the last half of 1950 probably will be up from the same period a year earlier as a result of the 3 percent increase in the spring pig crop. The average weight of hogs slaughtered is not expected to be much different from last year.

The production of beef and veal in 1950 may total slightly less than last year, but will be noticeably greater than in prewar years. Total beef and veal output during the first half of this year was slightly less than in the same period of 1949; production in the third quarter may also be slightly smaller than a year earlier. However, in the fourth quarter, cattle and calf slaughter probably will exceed that in the last quarter of 1949, and production of beef and veal may be larger in total this fall season than last. Slaughter of grass-fat cattle this fall will increase seasonally but probably will not exceed that of last fall. On the other hand, slaughter of grain fed cattle will increase during the rest of the year and early this fall will reach and surpass the level of a year ago. The number of cattle on feed on July 1 in 11 Corn Belt States was 34 percent greater than a year earlier.

The number of cattle and calves on farms on January 1, 1950, was 2 million greater than a year earlier, and more than 4 million larger than on January 1, 1942. Indications are that cattle and calf numbers in 1950 probably are increasing substantially.

Production of lamb and mutton has been decreasing for a number of years as a result of a marked reduction in sheep numbers on farms. Federally inspected slaughter of sheep and lambs for the first 5 months of this year kept pace with the same months last year. However, less lamb and mutton are expected to be produced in the latter half of 1950 than in 1949.

Prices of meats have advanced since mid-April. Demand for meat has been strong this spring and summer. Further price advances will occur until the seasonal increase in marketings begins in the early fall. Some price declines normally occur in the fall. However, strengthened consumer demand for meats may offset at least in part the usual seasonal movement.

Total supplies of meats for the second half of 1950 will include about the same quantity from cold storage stocks and from imports as in the second half of 1949. Cold storage stocks on July 1 were about the same as a year earlier. Military takings of meat so far this year have been at the lowest rate since 1940. Even if military procurement is substantially larger in the next 6 months than in January-June, it is not expected to exceed 3 or 4 percent of current meat output. Moreover, increased military demand would be partially offset by decreased civilian demand as men are transferred from civilian to military status.

Fish 1/

U. S. civilian per capita consumption of fishery products during the last half of 1950 is expected to be about the same as in the comparable period last year. Commercial landings during the summer months may be no better than a year earlier when the catch of some in-shore fish species, such as croakers and weakfish, was relatively small. Imports of fishery products are expected to continue larger than in 1949, and exports lower. Retail prices of fresh and frozen fishery products during the last half

1/ Prepared in cooperation with the Fish and Wildlife Service, U. S. Department of the Interior.

of 1950 probably will average about the same and may even exceed slightly those of the first half; canned fish are also likely to average somewhat higher.

During the first 6 months of 1950 U. S. civilian consumption of fresh and processed fishery products per person was approximately the same as a year earlier. The movement of fresh and frozen fish into domestic distribution channels during this period was lower while that of canned fish was somewhat larger than for the same months of 1949. The B.L.S. index of retail prices of fresh and frozen fish during the first half this year averaged slightly higher than a year earlier, but the reported price of canned pink salmon averaged more than one-fourth lower.

The commercial catch of fish and shellfish thus far this year has not been significantly different than in the same months of 1949, nor is much change anticipated for the rest of the year.

The commercial freezing of edible fishery products during the first half of 1950 was more than 10 percent smaller than a year earlier. This decline occurred mainly in New England and is due to many factors, among the most important of which are the fewer number of large fishing vessels in operation, the decline in the quantity of the popular species of fish available in the fishing areas adjacent to the coast, and the decline in landings of whiting.

Total stocks of edible frozen fishery products in the continental United States on July 1 were slightly larger than a year earlier. With production at a seasonal high level in the next few months, stocks of these products will be increased so that sufficient supplies will be available for distribution during the months of low production in late 1950 and early 1951.

Canned fishery products appear adequate for current domestic needs. Producers' stocks of these commodities on June 30 were lower than a year earlier, according to information from trade sources. Production in 1950 is currently expected to be very large, exceeded only by the record 1941 pack of 885 million pounds of canned fish and the near record output in 1949. For the other popular species of canned fish, the 1950 pack may not be larger than last year, but the canned tuna pack may set a new record.

Imports of edible fishery products in the first four months of 1950 totaled 137 million pounds, more than 15 percent greater than a year earlier. Increases were reported for each of the 3 major groups of fishery products -- the fresh and frozen, canned, and cured commodities. Exports of edible fishery products during January-April 1950, on the other hand, totaled 22 million pounds and were more than one-fourth smaller than in the same months last year, with the decline principally in canned fishery products.

Poultry and Eggs

In mid-July, egg and poultry meat supplies were at high levels, and were expected to continue so through 1950. Disappearance of eggs in 1950 is expected to be more than 380 eggs per person; that of poultry meat, slightly more than 30 pounds per person. These rates are somewhat larger than those of the year before, and much higher than in the years immediately preceding World War II. Egg consumption may average 23 percent above the 1941 per capita rate, with chicken consumption 27 percent and turkey consumption 37 percent higher per person.

Supplies of both eggs and frozen turkey are large enough that, at prevailing prices, there will be a significant surplus beyond the disappearance indicated above. Through mid-July, the Department of Agriculture had bought 75 million pounds of dried eggs from 1950 production for price support. During the first 3 weeks in July, the Department also bought 10 million pounds of 1949 crop frozen turkeys. The egg price support operation will continue at least through August, but the turkey purchase will end in July.

For eggs, the prospect is that prices will increase through the remainder of 1950. This will reflect usual seasonal influences as well as some strengthening of consumer demand. Supplies from current production will continue to decline until fall; the summer temperatures will reduce still more of the supply of top quality eggs which reach the retail market. However, the seasonal price increase is likely to be held in check by the fact that output will remain at a high level despite some seasonal decline in production. Also, there were ample storage stocks of shell and frozen eggs on July 1 -- in the case of shell about 60 percent larger than last year's holdings -- to supplement supplies from current production. Egg prices received by producers are about 30 percent, or about 12 cents per dozen, lower than a year ago. In general, this decline has been reflected at retail.

The Department of Agriculture held about 103 million pounds of dried eggs on June 30, purchased for price support, but which could be used to meet special export requirements.

Chicken and turkey prices at mid-year were also lower than a year ago. The strong demand for chicken meat in the last few months, as indicated by the fact that increased marketings have been absorbed without serious price declines, suggests that poultry meat prices may not fall from their present levels during the next few months when marketings from farms will be seasonally heavy and the marketings from specialized broiler areas will continue large.

In addition to the large supplies of chicken, a big turkey crop will come to market this fall and winter. These turkeys will be sold without benefit of the price support program which affected last year's prices. Therefore, current indications are that turkeys at the holiday season this year may be cheaper than a year ago.

Dairy Products

The civilian per capita consumption of most dairy products is at about the same rate as in the past two years. In fact, the average consumption of all important dairy products except butter is higher than in the years immediately preceding World War II.

Total milk output so far this year has been at a near record rate. Although the number of milk cows on farms on January 1, 1950 was 3 percent smaller than on January 1, 1941, production per cow is up about 10 percent. Moreover, a significantly larger proportion of the milk produced is being utilized as fluid milk or processed in whole form into such products as cheese and evaporated milk. Before the war, large quantities of milk were separated on farms for sale as butterfat. The skim milk resulting therefrom was fed to livestock or wasted. Now, human consumption of protein and minerals from milk is much greater.

It is interesting to compare the production of various dairy products with that of 1941. For 1950 it is expected that production of cheese, dry whole milk, and ice cream will be well over 1941 levels but output of butter, evaporated, and canned condensed milk will be lower. Butter production in 1950 is expected to be around 20 percent less than that of 1941; on the other hand, fluid milk and cream use will be up about 25 percent over 1941.

During the first half of 1950, fluid milk sales were up slightly over the comparable period of 1949 on the basis of sales in markets operating under Federal Orders. More butter was being produced but substantial quantities were bought by the Department of Agriculture in order to maintain producer prices of milk and butterfat at support levels previously announced. As of July 1, the Department held unsold supplies totaling about 176 million pounds of butter, 69 million pounds of cheese, and 342 million pounds of nonfat dry milk solids (dry skim milk). It has been announced that the current purchase program will be continued through March 1951.

Manufacturers' stocks of evaporated, condensed, and dried milk products during the first five months of 1950 ranged from 15 to 50 percent below a year ago. Private cold storage holdings of cheese were above last year; butter stocks are lower.

The output of manufactured dairy products is expected to continue during the remaining months of 1950 at about the same rates as in the latter part of 1949. Price support operations assure market outlets at about present prices. If consumer demand strengthens substantially, prices of dairy products could rise slightly.

The BLS index of retail prices for all dairy products was 4 percent below a year ago during January-May. With fairly stable consumer demand plus the steadying effect of the price-support program there seems to be little chance for any significant changes in retail prices for the remainder of 1950. Retail prices of major dairy products in the first five months of 1950 had not increased quite as much since 1941 as had the prices of all foods at retail.

Fats and Oils

United States civilian per capita consumption of fats and oils for food use in 1950 is likely to average about the same as the 43.1 pounds (fat content) consumed a year earlier. Consumption in 1935-39 averaged 44.7 pounds and in 1941 was 47.4 pounds. Margarine consumption in July-December 1950 is expected to be encouraged by the repeal of the Federal taxes on margarine, effective July 1. Although some decline in disappearance of butter is likely because of the probable increase in margarine consumption, the high level of consumers' income in prospect for the rest of the year will tend to encourage the consumption of butter and thus minimize this decline. Consumption of butter per person in 1950 may average about 3 percent less than the 10.5 pounds consumed in 1949.

Consumption of lard, shortening and margarine in January-April 1950 appears to have been as much as 10 percent greater than a year earlier. Most of the increase was in disappearance of shortening. This high rate of disappearance apparently was due at least partly to the building up of inventories, especially of shortening, by dealers and large consumers. Total disappearance of butter in the first four months of this year was 4 percent greater than a year earlier.

Lard output this summer is running moderately larger than a year ago. Production this fall probably will show some increase over the fall of 1949, reflecting the 3 percent increase in the 1950 spring pig crop compared with that of 1949. Factory and warehouse stocks of lard on June 1, the latest reported, totaled 189 million pounds, 15 million more than the year before.

Output of lard in 1950 probably will be well above the 1935-39 average of 1,630 million pounds and also above the 2,228 million pounds produced in 1941.

Supplies of the major vegetable oils used in food products may be somewhat smaller in the year beginning October 1950 than the record supplies of 1949-50. This will depend partly on the yield per acre of cottonseed and soybeans to be harvested from 1950 crops. On the basis of acreage estimates as of July 1, some reduction in output of edible vegetable oils next fall is indicated. However, if the yield per acre of soybeans should be as high as last year's record, production of edible vegetable oils next fall probably would be about the same as a year earlier and about double the 1937-41 average. Production of creamery butter in the second half of the year probably will approximate the 668 million pounds produced in July-December 1949.

Stocks of edible vegetable oils, including the oil equivalent of soybeans and cottonseed on June 1, 1950 totaled about 1,335 million pounds, about the same as a year earlier.

Exports of fats and oils in the latter half of 1950 are likely to total less than a year earlier. Compared with last year, ECA authorizations in January-June 1950 for exports of food fats and oils were small.

Also, Congressional appropriations for ECA in the year beginning July 1, 1950 are substantially smaller than a year ago. Accordingly, exports and shipments for the year may fall significantly below those of 1949. However, the fat and oil supplies from non-dollar areas are still low relative to demand.

Retail prices of food fats and oils except butter averaged substantially lower in January-May 1950 than the year before. Lard, margarine, shortening and salad dressing were 17, 12, 18 and 9 percent, respectively, lower than in 1949. With the support price for butter in 1950 (60 cents per pound) the same as a year earlier, the price of butter in the first 5 months of 1950 averaged 72.6 cents per pound, about the same as in 1949.

Retail prices of margarine, shortening and salad dressing have been increasing slowly since February 1950 and in May averaged 3 percent higher than in February. This has reflected the upward movement since last October of wholesale prices of the major edible vegetable oils. Cottonseed and soybean oils are important constituents of shortening and other food fats and oils. The retail price of lard, which remained stable from February to April, increased three percent in May. On the basis of current estimates of the supplies of fats and oils in prospect for the remainder of 1950, retail prices in the rest of the year should average about the same as a year earlier. Prices in July-December 1949 were well below the January-June 1949 level.

Fruit

Although supplies of fresh citrus fruits will be about as large this summer and fall as in the same period of 1949, supplies of most deciduous fruits from the 1950 crops will be somewhat smaller. However, supplies of most deciduous fruits will be seasonally large during summer and early fall. Supplies of most canned and frozen fruits and fruit juices and dried fruits will continue large enough for the usual domestic demand. Substantial tonnages of raisins, dried prunes, apples, and possibly oranges again will be available for export.

Per capita supplies of fresh fruits in 1950 will be at the lowest level since 1943, and more than 15 percent below the 1935-39 average. Most of the decline in consumption is due to the short citrus crops of early 1950 and the significantly smaller peach and pear crops. On the other hand, the utilization of fruit for processing probably will be much the same as last year. Domestic civilian consumption of canned and dried fruits is expected to be about the same as in the prewar year 1941, but more canned fruit juices and frozen fruits and fruit juices are being consumed than in any prewar year.

Retail prices for most fresh deciduous fruits probably will decline about seasonally until early fall, but remain somewhat above the prices of a year earlier. Prices for fresh citrus fruits are expected to continue relatively high until late summer, when new crop oranges and grapefruit from Florida become available. Prices for most processed fruits are not likely to drop below current levels and even may rise somewhat, especially as new-pack fruit reaches the market.

Prospects on July 1 pointed to a 1950 crop of deciduous fruits about 11 percent smaller than the large 1949 crop and 4 percent smaller than the average for 1939-48. The 1950 apple crop in commercial areas is expected to be about 11 percent smaller than the large 1949 crop but 9 percent larger than average. Other major fruit crops are smaller than in 1949, as follows: Sweet cherries, 42 percent; peaches, 26 percent; pears, 22 percent; and plums and prunes, 18 percent. On the other hand, the sour cherry crop is 29 percent larger than the 1949 crop, a new record; the strawberry crop is 17 percent larger; and the grape and apricot crops are each 3 percent larger.

Among the tree nuts, prospective production is smaller than that of 1949, as follows: walnuts, 27 percent; almonds, 17 percent; and filberts, 53 percent. But as usual, domestic production will be supplemented by heavy imports of such foreign-type tree nuts as Brazil nuts and cashews. The 1950 crop of Brazil nuts in the Amazon basin is reported to be about 22 percent above the 1944-48 average although about 40 percent smaller than the large 1949 production. Production of cashews is reported to be a little larger than the below-average 1949 crop.

With imports of bananas down somewhat from a year ago, per capita supplies also will be down from a year ago, when they averaged about 19 pounds per person.

As in other years, practically all fresh citrus fruits marketed during summer will come from California. Prospective supplies of Valencia oranges and lemons are a little larger than a year ago, while those of grapefruit are about the same. Prospects are good for the new citrus crops.

Even though the 1950 deciduous fruit crop is smaller than the 1949 crop, it will provide large tonnages of clingstone peaches, pears, apricots, sour cherries, and apples for canning. The 1950 pack of canned fruits may turn out about as large as the packs of the past few years. Shipments of canned pineapple from Hawaii, which were held up by strikes last summer, have been running heavy since last November, and they are expected to continue large this summer.

Because of the delayed shipments of the 1949 pack of canned pineapple, total packer and wholesale distributor stocks on June 1, 1950, were nearly three-fourths larger than a year earlier. Packers' stocks of 6 major items of domestically-canned non-citrus fruits combined (apricots, fruit cocktail, peaches, pears, sour cherries, and sweet cherries) were about 26 percent smaller on June 1, 1950 than the large stocks on June 1, 1949. Most of these supplies will be carried over into the 1950-51 pack season. Wholesalers' stocks of canned pears, apricots, fruit cocktail, and peaches combined were slightly larger on June 1, 1950 than a year earlier. But total packers' and wholesalers' stocks of these 4 items were 17 percent smaller than on June 1, 1949. The outlook is for consumption of canned fruits per person in 1950 to be near the 1949 rate of 18 pounds.

Supplies of canned fruit juices are expected to continue plentiful this summer and fall. Although the 1949-50 pack of canned single-strength citrus juices in Florida is about 8 percent smaller than the 1948-49 pack, stocks in the hands of packers July 1, 1950 were more than double the small stocks on that date in 1949. Then too, large supplies of frozen concentrated citrus juices are available from the 1949-50 pack, which in Florida was more than twice the 1948-49 pack. Per capita consumption of canned and frozen fruit juices combined is expected to be substantially larger in 1950 than in 1949.

Cold-storage holdings of commercially-frozen fruits and fruit juices on July 1, 1950 were about 31 percent larger than the stocks a year earlier. Most of the increase over a year earlier consisted of strawberries, fruit juices and purees. With increases in the packs of strawberries and sour cherries in addition to a doubling in the pack of citrus juices, the 1950 pack of frozen fruits and fruit juices is expected to set a new record.

Dried fruits are expected to continue plentiful this summer and fall. The 1950-51 pack of dried prunes may be about as large as the 1949-50 pack, but the raisin pack probably will be smaller. Total production of dried fruits in 1950-51 probably will be moderately smaller than that of 1949-50. But supplies will be more than enough for the current annual rate of consumption to continue a little over 4 pounds per person.

Vegetables

Consumption of fresh vegetables in 1950 is forecast at 248 pounds per person, only slightly lower than last year but a little above the rates just before World War II. Production of fresh vegetables is substantially greater than in prewar years, but our population has increased 14 percent in the past 9 years.

Aggregate production of truck crops for the commercial fresh market in the latter half of 1950 is not expected to be much different than in the second half of 1949 and other recent years. Production of vegetables for summer harvest on which information is available totals virtually the same this year as for the summer of 1949 and only slightly more than the 10-year average for the season. Production of late summer onions is not yet estimated but acreage is up 5 percent over that harvested last summer. Substantially more cabbage and watermelons have been produced this summer than last, but considerably less celery and tomatoes. Early fall cabbage acreage is up 6 percent, but late fall cabbage acreage is down 7 percent from last year. Early fall tomato acreage is 8 percent larger than last year and 12 percent more than the 1939-48 average.

During the winter season production was 9 percent larger than in 1949 and more than one-fifth larger than average. Spring-season production was about the same as last year but one-sixth larger than average. Total winter, spring and summer production taken together is only 2 percent larger than in 1949, though one-eighth larger than average.

The general level of retail prices of fresh vegetables during the remaining months of 1950 is expected to be much the same as last year.

The supply of canned vegetables is about equal to that of 1949. The rate of canned vegetable consumption is substantially above the 1935-39 average but not much higher than the prewar high of 1941. Prospects this year are that the total tonnage of truck crops grown for commercial processing may be about the same as last year. Aggregate acreages planted to 10 of these crops is only 6 percent smaller than the acreage planted last year. Early indications point to a crop of green peas 15 percent larger than last year's crop and 6 percent larger than average. The 1950 snap bean crop for processing has been tentatively forecast as not quite one-tenth smaller than last year but considerably larger than the 10-year average. Substantially smaller acreages this year than last have been planted to sweet corn, pickling cucumbers, and green lima beans, but increased plantings have been made in canning beets, kraut cabbage under contract, and tomatoes for processing.

Total stocks of 5 major canned vegetables in the hands of canners and wholesale distributors this June 1 were slightly smaller than a year earlier. Stocks were considerably larger than at the same time last year for snap beans and sweet corn, but were smaller for green peas, tomatoes and tomato juice. Stocks of most canned tomato-products, such as sauce, paste, and puree, also were lower than last year. Stock data for other canned vegetables for the most part are neither as complete nor as recent as for the above items. However, stocks of most other canned vegetable items are believed to be somewhat smaller than at the same time last year, but substantially larger than prewar stocks.

Frozen vegetable stocks are large, reflecting the record pack of 1949. However, supplies are moving into distribution channels rapidly. Stocks of frozen green peas are smaller than a year earlier, but are much larger for other items. Although the 1950 pack of frozen vegetables may be no larger than the 1949 record pack, civilian consumption per capita may be somewhat higher and even set a new record because of large supplies available from last year's pack and strong consumer demand. Green peas continue to be the most popular frozen vegetable, but frozen green lima beans are gaining rapidly.

Retail prices of canned vegetables generally and of some frozen vegetables were somewhat lower in the first half of 1950 than a year earlier. On the basis of present indications as to supplies, consumer purchasing power, and non-civilian takings, retail prices of processed vegetables during the last half of 1950 probably will be no higher than in the fall and early winter of 1949.

The 1950 potato crop is indicated to be slightly smaller than that of 1949. Civilian consumption per person is expected to be little if any larger than in 1949 and much below prewar rates. Government price support operations will continue in those areas which have not disapproved marketing agreements. However, prices to farmers in such areas are being supported at a little lower level this year. Retail prices probably will be down a little, from 1949.

The outlook for consumer supplies of sweetpotatoes is brighter this year. Prospects are for a crop 7 percent larger than last year, and larger than in any of the last 3 years, although 6 percent below the

10-year average. Important increases are indicated in areas producing commercially for sale, so market supplies should be somewhat larger than is indicated by the total crop. Retail prices of sweetpotatoes probably will be moderately lower in the last half of 1950 than a year earlier.

Abundant supplies of dry beans and adequate supplies of dry peas have been available for the first half of 1950 and this situation is expected to continue for the last half. Through 1949, consumption of dry beans per person was lower than before the war. Retail prices have been relatively high. In 1950, consumption of dry beans per person may increase because of lower prices for beans and generally sustained prices for many other foods. Not much change is expected in retail prices of dry peas, but there may be a slight decline in dry bean prices reflecting the somewhat lower level of support on the 1950 crop of beans. The prices of dry peas from the 1950-crop will not be supported by Government action. Very large stocks of dry beans are being carried over in Government hands from previous crops. Prospective dry bean production this year is one-fifth less than last year's record crop but only slightly smaller than the 10-year average. The dry pea crop forecast is the smallest since 1940, about one-seventh below the 1949 crop and less than half the recent 10-year average.

Food Grains

Civilian consumption of cereal food products per person in the United States this year is expected to be about the same as in 1949, but substantially lower than in the prewar years, 1935-39 and 1941. Supplies of cereal food products are plentiful but demand is apparently smaller. July 1 crop indications are that the new wheat and corn crops will each be about 200 million bushels short of the 1949 crops, the rice crop will be down 5 million bags, but that the crops of oats, barley, and rye will be larger than last year. Despite reductions in wheat and corn, the 1950 crops of food and feed grains will total significantly more than our prewar crops. For example, compared with the 1941 crops, wheat will be about the same, rice more than half again as large, corn and oats about one-fifth greater.

The new crops plus the relatively large stocks from previous crops on hand at the beginning of the new crop year will provide plentiful supplies for domestic food and non-food needs, will permit sizeable quantities to be exported, and still leave substantial operating stocks for 1951. Accordingly, retail supplies of the cereal food products will continue plentiful and retail prices in the remaining months of 1950 are not likely to change much from present levels.

Prospective wheat supplies in the United States during the current crop year, 1950-51, are expected to total about 1,400 million bushels, slightly lower than in the preceding crop year. The prospective 1950 wheat crop of 957 million bushels may be the first crop of less than one billion bushels since 1943, but it will be large relative to prewar crops.

Domestic disappearance of wheat from the 1950-51 supplies may total about 700 million bushels, almost 490 million of which is expected to be used as food and the remainder mainly for seed and livestock feed. If wheat exports and shipments to U. S. territories total about 250 million bushels, (or more, depending on developments), carryover of wheat from the 1950 crop, June 30, 1951, would be about 450 million bushels, approximately the same as on June 30, 1950. This would be the first year since 1947 that carryover would not be larger than the preceding year, but stocks still would be the third largest on record.

Rye supplies during the 1950-51 crop year are currently estimated at about 40 million bushels, about 2 million bushels larger than in the preceding crop year and sufficient to meet the domestic needs, export requirements, and provide for adequate carryover at the end of the year. The 1950 rye crop, estimated in July at 21.9 million bushels, is almost one-fifth above the preceding year's crop, but 32 percent below the 10-year (1939-48) average. Imports during the current 1950-51 crop year may total about 7 million bushels.

The domestic food use of rye products during 1950-51 is expected to amount to about 5 million bushels, the same as a year earlier. Non-food use of rye in the United States, principally for seed, livestock feed and alcohol, may not exceed the 1949-50 level of more than 15 million bushels. With exports likely to be about 8 million bushels, carryover stocks in mid-1951 probably will be equal to or slightly larger than a year earlier.

The 1950 rice crop, currently estimated at 2,288 million pounds (milled basis), is 12 percent less than the record 1949 crop. According to present indications, civilian takings from the new crop may be about as large as in the 1949-50 marketing year and little different from consumption in the prewar years 1935-41. Exports through commercial channels and for civilian relief in occupied areas have been of record proportions during the past year. The carryover of old rice into 1950-51 will be no larger than the prewar average.

Supplies of corn, oats and barley are expected to be fully adequate for domestic and export requirements for the coming year. Based on indications in July, production of these 3 grains in 1950, will be smaller than in the past 2 years, but a record carryover is in prospect and the total supply will be closer to the record of last year. The total corn supply for 1950-51 is expected to be only a little smaller than the record of 4.2 billion bushels last year and about one-third larger than in the immediate prewar period. Stocks of corn on July 1 were much larger than in prewar years and are more than ample for domestic and export requirements this summer. The large volume of corn held under price support, however, will be an important factor in maintaining corn prices near the 1949 loan rate during the next few months. The 1950 corn crop of about 3.2 billion bushels as indicated in July will be adequate for 1950-51 prospective domestic and export requirements permitting large stocks to be carried over again at the close of the 1950-51 season.

Domestic consumption of corn products as food in the first half of 1950 is estimated to have been close to the level of 1949. Wholesale prices of most of the corn products have advanced since the first of the year. In June, wholesale prices of corn sugar, starch, and sirup were 5 to 10 percent higher than a year earlier. Prices of corn products probably will continue higher in the last half of 1950 than in 1949.

The total supply of oats for 1950-51 is about equal to that of of a year ago and one-fourth larger than in 1937-41. Supplies will be ample for domestic food uses during the 1950-51 marketing year. The 1950 crop now being harvested was estimated in July at 1,395 million bushels, 5 percent larger than in 1949. Oats prices in June were about one-third higher than a year earlier and probably will continue higher at least through the summer months.

The barley supply for 1950-51 is estimated to be a little larger than in 1949-50, and also larger than in most prewar years. Barley prices in recent months have been somewhat higher than a year earlier. Malt prices are currently above those of a year earlier and may continue higher this summer and fall reflecting the higher level of barley prices.

The total supply of all food concentrates for the 1950-51 season is expected to be about 175 to 180 million tons, close to the record supply of 1949-50 and 15 to 20 percent larger than in 1941-42. This includes prospective supplies of the feed grains, corn, oats, barley and sorghums, byproduct feeds, and an allowance for wheat and rye feeding at about the 1949-50 rate. The number of grain consuming animal units to be fed is expected to be near the level of last year and only slightly larger than in 1941-42, indicating a supply per animal unit about one-sixth greater than just before the war. The hay supply for 1950-51, based on indications in July, will probably total about 118 million tons, a little larger than in the past two years in total and per animal unit. Supplies would be about 7 percent larger in total and about 15 percent larger per hay consuming animal unit than in 1941-42.

Sugar

Sugar consumption per person in 1950 is now expected to be at least as large as in the two preceding years and may be the highest since 1941. In that year substantial stocks were accumulated by consumers as well as by large industrial users. Actual consumption was also very high.

Distribution of sugar by primary distributors in the U. S. during the first half of 1950 amounted to 3,775 thousand short tons (raw value) as compared with 3,601 for the corresponding period of 1949.

On July 13, the Department of Agriculture announced an increase of 350,000 short tons, raw value, in the supply of sugar that will be made available under 1950 sugar quotas, raising the consumption requirements total to 7,850 thousand short tons. Accordingly, total sugar available for distribution during the last half of the year under the revised quota is 200,000 tons greater than actually moved during the first half.

The supply situation is quite good. Present indications are that record beet and cane crops will be harvested this year in the domestic producing areas. Total production of sugar in 1950-51 in the major offshore producing areas supplying the U. S. market is also likely to be larger than in 1949-50. Output in all of the principal areas except the Philippines has expanded since before the war. Furthermore, at the present time very substantial uncommitted supplies of sugar in Cuba and other offshore areas are available to the U. S. if needed. In Cuba alone, a reserve of approximately 400,000 tons over and above the present U. S. quota for that area is being held for the U. S. In addition, the Cuban government has other uncommitted stocks in reserve.

The duty paid price per pound of raw sugar at New York declined from 5.75 cents in January to 5.52 cents in April, but rose during May, June, and early July, averaging 5.78 cents per pound in June. Average net wholesale prices at New York declined from January to April and remained steady during May and June. By early July, however, prices were rising. During the week of July 3, they averaged 7.85 cents per pound compared with 7.70 in the April-June period. The rise had not materially affected retail prices by early July. Current levels at wholesale and retail, however, still average about the same as a year earlier.

Table 5. - Production of major food commodities, calendar years, 1935-39 average, 1941, 1948, 1949 and preliminary estimates for 1950 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1941	1948	1949	1950 Prel. 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Meats (carcass weight)								
Beef	Mil.lb	6,937	8,082	9,079	9,448	9,400	136	99
Veal	do	1,038	1,036	1,412	1,322	1,300	125	98
Lamb and mutton	do	870	923	750	607	600	69	99
Pork (excluding lard)	do	7,337	9,528	10,205	10,333	10,900	149	105
Total meats	do	16,182	19,569	21,446	21,710	22,200	137	102
Fish (edible weight)								
Fresh and frozen	do	615	757	760	3/	3/	-	-
Canned 4/	do	337	470	485	3/	3/	-	-
Cured	do	74	71	63	3/	3/	-	-
Total fish	do	1,026	1,298	1,308	3/	3/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	3,839	5,056	5,168	5,450	163	105
Chicken (dr. wt.)	Mil.lb	2,327	2,789	3,284	3,857	3,980	171	103
Turkey (dr. wt.)	do	350	465	505	699	725	207	104
Dairy products								
Total milk 5/	do	106,450	118,094	118,353	121,962	124,826	117	102
Cheese 6/	do	669	956	1,094	1,193	1,208	181	101
Cond. and evap. milk	do	2,225	3,555	3,778	3,154	3,375	152	107
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	2,268	1,509	1,692	1,800	83	106
Lard 7/	do	1,630	2,228	2,356	2,552	2,650	163	104
Margarine (fat content)	do	303	297	735	701	758	250	108
Shortening	do	1,529	1,409	1,441	1,483	1,548	101	104
Other edible fats and oils 8/	do	575	1,020	1,281	1,889	1,590	277	84
Total fats and oils 9/	do	6,207	7,222	7,322	8,317	8,346	134	100
Fruits								
Fresh:								
Citrus	do	6,875	8,167	8,681	7,658	6,900	100	90
Apples (commercial)	do	4,385	4,143	3,275	4,113	3,900	89	95
Other (excl. melons)	do	4,703	5,373	4,530	5,070	4,600	98	91
Processed:								
Canned fruit	do	1,705	2,318	2,511	2,558	2,500	147	98
Canned fruit juices	do	333	993	2,513	2,127	1,900	571	89
Frozen	do	106	208	402	483	640	604	133
Dried	do	1,118	904	918	980	900	81	92

- Continued

Table 5. - Production of major food commodities, calendar years, 1935-39 average, 1941, 1948, 1949 and preliminary estimates for 1950 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1941	1948	1949	1950 Prel. 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Vegetables								
Fresh 10/	Mil.lb.	30,520	32,228	38,511	37,396	38,000	125	102
Canned 11/	do	4,030	5,770	5,824	6,062	6,200	154	102
Frozen	do	12/ 78	107	446	564	550	705	98
Potatoes	Mil.bu.	355	356	455	402	390	110	97
Sweetpotatoes	do	68	63	50	54	58	85	107
Dry edible beans 13/	Mil.lb.	1,360	1,710	1,954	2,006	1,600	118	80
Canned baby foods	do	48	126	526	511	545	1135	107
Sugar, raw basis	1,000 sh.tons	1,948	2,090	1,917	2,112	2,300	118	109
Grains								
Wheat	Mil.bu.	759	942	1,314	1,146	957	126	84
Rye	do	44.9	43.9	26.4	18.7	21.9	49	117
Rice, milled	Mil.lb.	1,340	1,541	2,290	2,503	2,607	195	104
Corn, grain only	Mil.bu.	2,050	2,414	3,402	3,109	2,900	141	93
Oats	do	1,045	1,183	1,493	1,323	1,395	133	105
Barley	do	239	363	316	238	265	111	111
Peanuts, farmers' stock basis	Mil.lb.	1,229	1,475	2,338	1,853	3/	-	-

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Preliminary estimates based on trends in livestock numbers, current or prospective rates of output, average or probably acreages and yields, and such other data or advance estimates as are available. These estimates are only used to indicate the general level of food supplies for domestic consumption for 1950, but they are based on such official estimates of production as are available at this time. Revisions will of course be made from time to time throughout the year as official indications or estimates are issued through the Crop Reporting Service of the Department. 3/ Not available. 4/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 5/ Includes total farm production of milk and off-farm production. 6/ Excluding full skim, cottage, pot and bakers' cheese. 7/ Including amount used in manufactured food and nonfood products. 8/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 6.- Retail food prices and total consumer price index, United States, 1940-47 and 1948-50 by months
(Index numbers 1935-39=100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949	233	201	187	148	170	219	153	227	176	221	202	169
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170
July	236	204	182	141	170	221	154	228	176	208	202	168
Aug.	240	222	185	144	169	211	150	230	176	209	203	169
Sept.	244	233	185	148	170	209	148	230	177	211	204	170
Oct.	235	228	187	144	169	202	147	228	178	214	201	168
Nov.	229	208	186	140	169	213	146	225	179	265	201	169
Dec.	223	178	186	137	169	208	145	224	179	292	197	168
1950												
Jan.	219	152	184	135	169	217	143	224	179	300	196	167
Feb.	222	141	184	134	169	210	143	222	178	304	195	166
March	227	150	182	134	169	205	143	222	177	312	196	167
April	228	150	179	135	169	212	143	223	175	308	197	167
May	240	144	178	137	170	220	143	225	175	299	200	169

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-54 BAE OCT. - DEC. 1950

Approved by the Outlook and Situation Board, October 25, 1950

SUMMARY

Food consumption per person in the United States is likely to be somewhat higher next year than in any of the last three years. Supplies of most foods will be a little larger but will not keep up with accelerated consumer demand. Accordingly, food prices can be expected to rise moderately before mid-year.

The rather optimistic outlook for domestic food consumption in the remaining months of 1950 and in 1951 rests primarily on the probability of a continued high level of domestic food production. The very favorable demand situation doubtless will encourage all-out production of livestock products and other foods with high consumer preference Near record feed supplies will permit substantial increases in livestock output. Large commercial stocks of staple foods are available for distribution during the coming months, and additional supplies of dairy products and some other foods procured by the Department of Agriculture under price support programs are also a part of the total supply. Imports of food next year probably will be at least as large as in any year since 1941, but exports of U. S. food may show some further decline. Although the armed forces will buy much more food for their own use in 1951, military takings of food during the coming year are not likely to amount to more than about 3 or 4 percent of total food utilization, unless the world political situation should necessitate much larger U. S. armed forces than now planned for 1951. Therefore, food supplies for civilian consumption will not only reach a new high in total but are likely to be somewhat higher on a per person basis than in the past 2 or 3 years.

Consumer demand for food has strengthened considerably since last spring and prospects are for further expansion next year. Several factors will contribute. The rise in employment, hours worked, and hourly wage rates will increase consumer incomes. Increases in consumer incomes may be only partly offset by higher taxes and other anti-inflationary measures. Larger social security benefits will permit increased food consumption by many individuals. Probable reductions in output of consumer durable goods and perhaps some non-durables, as well as credit controls, will make available additional consumer purchasing power for food.

During the remaining months of 1950 the supplies of most livestock products, fresh vegetables, sweetpotatoes and sugar will be slightly larger than a year earlier and substantially more citrus fruit will be moving to market. The supplies of several fresh and processed deciduous fruits are expected to show some decline from the previous year's level. Supplies of many foods in 1951 are expected to be slightly larger than this year. Among the foods in this category are most of the livestock products, margarine, fresh fruits and vegetables and canned vegetables. On the other hand, somewhat smaller supplies of canned fish and shortening are to be expected next year.

Food exports in the period July 1, 1949 to June 30, 1950, totaled about 35 billion pounds, but they were almost 30 percent lower than in the preceding year and the smallest since the end of World War II. The decline in exports was principally the result of considerable improvement in the food supply situation abroad. With relatively good crops in Europe this year and a rather favorable stock situation for foods in Western Europe, exports are likely to be somewhat smaller next year.

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Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1941, 1944-49 and preliminary estimates for 1950, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1941	1944	1945	1946	1947	1948	1949	1950 Prel. 1/	1950 as a percentage of 1949
Food grains 2/	131	148	155	164	197	189	166	144	87
Truck crops 3/	116	137	142	152	140	143	143	147	103
Fruits and nuts 4/	113	123	113	133	126	115	121	122	101
Vegetables, excluding truck crops 5/	100	106	110	128	107	124	114	113	99
Sugar crops 6/	97	81	94	103	110	91	96	115	120
Total food crops 7/	116	129	130	144	147	144	136	131	96
Meat animals 8/	117	155	147	145	145	134	139	144	104
Poultry 9/	120	166	170	160	157	153	169	180	107
Dairy products 10/	110	115	119	119	117	114	117	119	102
Total food livestock	115	144	142	139	138	131	138	143	104
Food production	115	140	139	140	140	134	137	140	102
Agricultural production, food and non-food	113	137	134	137	136	138	140	137	98
Civilian per capita food consumption	109	112	114	119	115	111	111	112	101

1/ Production estimates are based on preliminary crop indications as of October 1, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1950.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1950 1/

Year	Total food utilization	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Civilian	Distribution: Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.1	.1		91.4	4/ 3.5	2.1	2.2	.1		3.0
1949	100.0	95.2	5.1		.3	91.0	4/ 3.3	2.4	1.6		.8	3.3
1950 Prel.	100.0	94.8	5.4		.2	92.8	4/5/2.1	1.8	1.1		.7	3.3
Section b. Percentage of 1935-39 food utilization												
1935-39 av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.1	.6		1.6
1945	136.4	130.5	6.6		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.8	125.8	6.9	.1		121.4	4/ 4.7	2.7	2.8	.1		4.0
1949	135.1	128.6	6.9		.4	123.0	4/ 4.4	3.2	2.2		1.0	4.5
1950 Prel.	138.5	131.4	7.4		.3	128.5	4/5/ 2.9	2.5	1.6		.9	4.6

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces. 5/ Excludes grain products and some other foods for civilian feeding in Germany, formerly purchased by the Army but procured through the Department of Agriculture and commercial channels in 1950.

RETAIL FOOD PRICES

Retail food prices in 1951 are likely to average moderately higher than in 1950. Food prices have risen through most of 1950 with a fairly sharp rise following the Korean outbreak. Retail food prices are not likely to rise much more before late winter. There is likely to be reinforced pressure on prices next spring. Accelerated consumer demand for food, unless checked by anti-inflationary measures or other developments, could push food prices by mid-year up to and even above the record level of the summer of 1948.

General economic activity, employment, and consumer disposable income are expected to be higher in 1951 than in 1950. Government expenditures under the defense program are expected to increase and will be an important factor in the expansion in economic activity. However, in order to assure sufficient production of goods needed for defense, some raw materials and production facilities are likely to be diverted to defense use. As a result, the output of consumer durable goods would be reduced. This decline in output plus restrictions on consumer credit may divert a larger proportion of consumer expenditures to food and other available goods and services. The prospective increases in civilian food supplies are not likely to keep up with the expansion in consumer demand for food.

In addition to the impetus from expanded consumer demand, retail food prices will bear the brunt of prospective increases in marketing charges. Some of the major components of food marketing charges -- i.e., taxes, wages, and storage costs -- are expected to increase in 1951.

Another important aspect of the food price situation is, of course, the extent to which military and export takings will affect supplies available for civilian consumption. The total food supply for the year may reach a new high. According to present indications, military procurement will increase substantially, but exports of food commodities may decline next year with the improved food situation in Western Europe and with domestic U. S. demand taking up more of the available supplies in this country. Accordingly, total non-civilian takings may loom no larger, proportionately, in the total food picture than they have in the past three years although military demands will give rise to special pressure on a few food commodities.

The expectation of rising food prices in the late winter and next spring is also influenced by the following facts. Supplies of such foods as meats, processed fruits and vegetables will be seasonally reduced while consumer demand is still strengthening. Prices of these items probably will rise more than seasonally. These price increases appear likely to more than offset lower prices for seasonally larger supplies of dairy products and eggs. According to present indications, meats, food fats and oils (possibly excepting butter), and rice would be the principal commodities for which ceiling prices could be established, in accordance with the provisions of the Defense Production Act of 1950, which expires June 30, 1951.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1941, 1946, 1948, 1949 and estimates for 1950 with percentage comparisons 1/

(Primary distribution weight)

Commodity	Average 1935-39	1941	1946	1948	1949	1950 Prel.	1950 as a percentage of 1935-39	1950 as a percentage of 1949
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Percent	Percent
Meats (carcass weight) - Total	126.2	142.8	153.4	145.4	143.9	145.1	115	101
Beef	55.2	60.5	61.3	62.6	63.5	63.1	114	99
Veal	8.1	7.6	9.9	9.4	8.7	8.2	101	94
Lamb and mutton	6.8	6.8	6.6	5.0	4.1	3.9	57	95
Pork (excluding lard)	56.1	67.9	75.6	68.4	67.6	69.9	125	103
Fish (edible weight) - Total	11.1	11.8	11.0	11.0	11.0	2/	-	-
Fresh and frozen	5.3	6.3	6.2	6.3	6.2	2/	-	-
Canned 3/	4.8	4.7	3.8	3.8)	4.8	2/	-	-
Cured	1.0	.8	1.0	.9)				
Poultry products								
Eggs 4/	37.3	38.9	46.8	48.2	47.4	48.0	129	101
Chicken (dressed weight)	17.9	20.5	25.4	23.1	25.3	26.0	145	103
Turkey (dressed weight)	2.6	3.5	4.5	3.6	4.1	5.0	192	122
Dairy products								
Total milk (whole milk equivalent)	801	808	813	750	760	763	95	100
Cheese	5.5	5.9	6.7	6.8	7.2	7.1	129	99
Condensed and evaporated milk	16.7	18.4	18.5	20.2	19.9	19.8	119	99
Fluid milk and cream	340	352	423	387	385	390	115	101
Fats and oils - Total, fat content 5/	44.7	47.4	39.7	42.7	43.1	45.2	101	105
Butter, farm and factory (actual weight)	16.7	16.0	10.5	10.0	10.5	10.5	63	100
Lard	11.0	13.7	11.8	12.9	11.8	12.4	113	105
Margarine (actual weight)	2.9	2.7	3.8	6.1	5.7	6.1	210	107
Shortening	11.7	10.3	10.1	9.6	9.6	10.6	91	110
Other edible fats and oils	6.3	8.3	6.2	7.2	8.6	8.7	138	101
Fruits								
Fresh - total	138.5	148.5	138.3	130.6	125.0	114.1	82	91
Citrus	48.9	57.4	58.7	53.9	47.4	41.2	84	87
Apples (commercial)	30.4	31.5	23.2	25.8	24.8	25.9	85	104
Other (excluding melons)	59.2	59.6	56.4	50.9	52.8	47.0	79	89
Processed								
Canned fruit	14.9	17.8	21.8	18.0	18.1	19.4	130	107
Canned juices	3.9	8.5	17.7	17.9	15.5	13.6	349	88
Frozen	.8	1.3	3.1	3.0	3.5	4.0	500	114
Dried	5.8	4.3	4.6	4.1	4.5	4.2	72	93
Vegetables								
Fresh	235	242	272	261	251	258	110	103
Canned	29.9	37.1	46.5	36.8	38.2	38.3	128	100
Frozen	6/ .4	.7	2.0	3.0	3.0	3.4	850	113
Potatoes	131	129	127	112	108	108	82	100
Sweetpotatoes	21.4	18.3	18.2	13.0	13.9	14.6	68	105
Dry edible beans	8.8	8.8	8.7	6.8	7.1	8.9	101	125
Dry field peas	.6	.5	.8	.7	.6	.6	100	100
Sugar, refined	97.0	103.7	74.4	95.5	95.6	7/96-100	101	103
Grains								
Corn products:								
Corn meal	22.9	20.5	15.9	13.8	13.5	13.5	59	100
Corn sirup	7.6	8.5	11.8	8.2	8.5	9.0	118	106
Corn starch	1.3	1.5	1.8	1.7	1.8	1.9	146	106
Corn sugar	2.7	4.0	3.8	4.0	4.1	4.5	167	110
Breakfast cereals	1.6	2.3	1.9	1.5	1.5	1.5	94	100
Hominy	1.4	1.9	2.7	2.9	2.7	2.7	193	100
Oatmeal	3.9	4.0	3.1	2.9	2.9	2.9	74	100
Barley food products 8/	1.4	1.3	2.0	1.5	1.5	1.5	107	100
Wheat:								
Flour 9/	159	155	156	137	135	135	85	100
Breakfast cereals	3.7	3.8	3.3	3.3	3.3	3.3	89	100
Rye flour	2.2	2.2	1.8	1.4	1.4	1.4	64	100
Rice, milled	5.6	5.8	4.0	4.8	5.7	5.7	102	100
Beverages								
Coffee 10/	14.0	15.8	19.9	18.2	18.6	17	121	91
Tea	.67	.78	.57	.56	.59	.65	97	110
Cocoa beans	4.4	4.7	4.2	3.8	4.1	4.5	102	110
Peanuts (shelled)	4.3	4.7	4.9	4.3	4.4	4.4	102	100

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies. 1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits, dry field peas and peanuts on a crop year basis; rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 311 in 1941, 374 in 1946, 386 in 1948, 379 in 1949 and 384 estimated for 1950. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ Based on the U. S. consumers' requirement of 8.7 million short tons (raw value) as determined by the Secretary of Agriculture. 8/ All barley food products in terms of malt equivalent. 9/ Includes white, whole wheat, and semolina flour. 10/ Green bean basis.

NUTRITIONAL REVIEW 1/

Larger available supplies of the major nutrients, and in particular calcium and ascorbic acid will be available in the 1951 food supply. This increase in the supplies of nutrients reflects the expected over-all increase in the level of domestic food consumption in 1951, but mainly the increased consumption of fluid milk, meat, eggs, leafy green and yellow vegetables, and citrus fruit. Accordingly civilian diets on a per capita basis will contain even larger quantities of most nutrients than in the last two years of high nutritional standing.

Of particular interest will be the reversal in the downward trend of supplies of calcium which has occurred since 1946. Civilian consumption of fluid milk and cream is expected to be somewhat larger in 1951 than during the past few years, while that of cheese may reach a new high level. At the same time, the increase in ice cream consumption also is expected to end a four year period of consumption declines.

The larger citrus crop this year will permit a greater consumption of oranges and grapefruit in 1951 than in the last few years and a record consumption of the frozen citrus juices. This, plus the increased consumption of tomatoes, will be reflected in an increase in the available supplies of ascorbic acid.

With increases in the consumption of leafy, green and yellow vegetables in 1951, greater quantities of Vitamin A will be available. Protein too, will increase slightly, reflecting greater consumption of dairy products, meat, and eggs.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1941, 1946, 1948, 1949 and estimates for 1950, with percentage comparisons 1/

Nutrients	Units	Average 1935-39	1941	1946	1948	1949	1950 Prel.	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Food energy	Cal.	3,280	3,430	3,390	3,260	3,240	3,320	101	102
Protein	Grams	89	94	104	94	94	95	107	101
Fat	Grams	132	144	147	142	140	145	110	104
Carbohydrate	Grams	431	440	417	402	404	413	96	102
Calcium	Grams	.94	.99	1.15	1.05	1.04	1.05	112	101
Iron	Mg.	13.6	14.4	18.6	16.5	16.4	16.6	122	101
Vitamin A value	I.U.	8,100	8,400	9,500	8,600	8,500	8,700	107	102
Thiamine	Mg.	1.43	1.63	2.18	1.93	1.89	1.93	135	102
Riboflavin	Mg.	1.86	1.97	2.58	2.35	2.32	2.35	126	101
Niacin	Mg.	15.2	16.7	21.3	19.0	18.8	19.0	125	101
Ascorbic acid	Mg.	115	123	137	125	119	119	103	100

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for 1946-50 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour.

1/ Prepared by the Bureau of Human Nutrition and Home Economics.

COMMODITY REVIEWS

Meats

The production of meat is increasing seasonally and is expected to be somewhat larger than in the fall months of 1949. With larger supplies available this October-December, civilians are expected to consume more meat than a year ago even though military purchases for use of the armed forces have been increased. Retail prices of meat during the fall and early winter months are expected to decline somewhat less than seasonally and average higher than in the same period of 1949.

Pork will account for most of the increase in meat supplies in the fourth quarter this year. More hogs are being marketed -- the spring 1950 pig crop which is now being slaughtered was three percent above the corresponding crop a year earlier-- and they are being marketed at heavier weights.

Beef production this fall and early winter is expected to be somewhat larger than a year earlier, with a larger proportion of it the better quality beef that comes from grain-fed cattle. Veal, lamb and mutton supplies are not likely to be much different this fall than last.

Total meat production in 1951 may be from 3 to 5 percent above the level of 1950, with most of the increase probably occurring in the second half of the year. Consumer demand is likely to remain strong; the uptrend in both hog and cattle numbers probably will continue; and ample supplies of feed grains are available. Next year's meat output is expected to be sufficiently large not only to supply expanded military requirements but to provide for at least a slight increase in civilian consumption. Retail prices of meat are expected to average significantly higher for the year as a whole than in 1950 as a result of the strong demand generated by the high level of employment and consumer incomes in prospect.

Most of the increase in total supplies of meat in 1951 will be in pork, which may be from 5 to 7 percent above the 1950 level. During the early part of the year, pork supplies will be larger than in the same period of 1950 because of both the anticipated larger number of hogs slaughtered and the slightly heavier weights at which the hogs will be marketed. The latter would be a reversal of the trend toward lighter hogs which was evident in the past few years. Pork supplies in the spring and summer months will be determined by the size of the 1950 fall pig crop, which, based on reported breeding intentions last June, may be about 5 percent larger than the 1949 fall crop. Production of pork in late 1951 will depend on the size of the pig crop raised next spring. Expectations are that the spring pig crop will be slightly larger than that raised in spring 1950.

Beef production may be a little larger in 1951 than in 1950, but not much change in veal output is anticipated. For the past two or three years the number of cattle on farms has been rising, but the number slaughtered each year has been nearly constant. In view of the prospective strong consumer demand for meat, the first increase in the number of cattle slaughtered -- a rather small one -- is likely. Cattle numbers have not yet been expanded to the point where they can provide for further increase in numbers on farms as well as furnish slaughter numbers large enough to match the relative increases in pork production.

Supplies of lamb and mutton, already at a record low point, probably will continue small in 1951. If sheep growers hold back from the market large numbers of lambs for the purpose of rebuilding herds, the production of lamb and mutton may be even smaller than in 1950. Sheep numbers, which began to decline in 1942, may be nearly stabilized in 1950. As a result, no sizeable increase in lamb and mutton production may be expected for several years hence.

With employment and consumer incomes likely to expand in 1951, the retail price of meats is expected to average significantly higher next year. Prices probably will start moving upward during the early part of 1951 and are likely to continue in this direction until the peak marketing period begins in the fall. The expected small increase in output in prospect for 1951, as compared with production in 1950, may have some moderating effect on the rate at which the prices will increase. With supplies about constant, average meat prices tend to vary with the level of consumer incomes both directly and proportionately.

If price controls should be instituted under the Defense Production Act of 1950, minimum price ceilings on meat animals would be either the highest price received between May 24 and June 24, 1950 or the parity price, whichever was higher, with adjustments for season, grade, and location. This would mean that minimum ceilings on beef, veal and lamb would be related to prices in May 24 - June 24 (when they were well above parity relationships), whereas pork prices would involve the use of parity relationships. Any substantial increase in meat prices would put them into the range subject to control.

United States foreign trade in meat products during the past two years has been insignificant in relation to total meat production in the United States during this period. In 1950, for example, domestic meat production may total about 22,500 million pounds, imports about 300 million pounds (carcass equivalent), and exports no more than 150 million pounds. Unless large emergency export needs should develop in 1951, foreign trade in meat probably will continue to be relatively insignificant.

Fishery Products 1/

The civilian consumption of fishery products in the United States during the remainder of the year is expected to be much the same as in the comparable months of 1949. Although supplies of some canned fishery products available to civilians probably will be lower than last year, consumption of all canned products in the next few months may be about as large as last fall and early winter. Consumption of fresh and frozen fishery products will run at about the same rate as in late 1949. With strong consumer demand for food in prospect, retail prices of the fresh and frozen products during the remainder of 1950 are expected to continue at a higher level than a year earlier. Although much above the level of prices prevailing earlier during 1950, prices of canned fish may average only slightly higher than in the fall months of 1949.

1/ Prepared in cooperation with the Fish and Wildlife Service, U. S. Department of the Interior.

Commercial landings and, as a result, the commercial freezing of fish will decline seasonally as the winter months approach. Cold storage stocks of frozen fish for human consumption in continental United States totaled 141 million pounds on October 1, about 10 percent above a year earlier. Cold-storage stocks probably will be expanded still further as the fall season continues in order to build up supplies of frozen fish for distribution during the low production period in the winter months.

The output of canned salmon in 1950 was much lower than last year and the lowest since 1921. Canned tuna and Maine sardine production are running ahead of output during the same months in 1949 and are likely to establish record high levels for the year.

Imports of fishery products this fall, especially of frozen groundfish and rosefish fillets, are expected to be larger than in the same period of 1949. Exports of fishery products during the remainder of 1950 probably will not be as large as a year ago.

Supplies of fishery products in 1951 are not expected to be much different in total than a year earlier. More fresh and frozen fish probably will be available, but there will be somewhat smaller supplies of canned fish, particularly of canned salmon, at least through mid 1951. Military purchases of fishery products, particularly of canned fish, are expected to be much larger than procurement from the output of a year earlier. In view of the prospective strong consumer demand for food, especially for meat and other protein foods, retail prices of fresh and processed fishery products probably will average somewhat higher for 1951 than for the preceding year; those of canned salmon will average much higher.

Imports of fishery products in 1951, especially the frozen commodities, are expected to continue at a high level and may even be slightly larger than a year earlier. Exports of these products may not be much different from the levels of the past two or three years, at least until the latter part of 1951.

Poultry and Eggs

Supplies of poultry products available during the last quarter of 1950 will be at a record high level for the season. With strong consumer demand in prospect, civilian per capita consumption of these products during the balance of 1950 may be greater than in the last quarter of 1949. For the year 1950 as a whole, civilian per capita consumption of eggs may total 384 per person, and for poultry meat (turkey and chicken) 31 pounds per person, in each case slightly more than during last year. Retail prices of turkeys this fall and early winter are expected to be about the same or slightly lower than in the fall and early winter of 1949; those of most chickens may be about the same, but egg prices may be a little lower. The large supplies of these commodities are likely to offset in part the effect of increased consumer demand on poultry and egg prices.

The quantity of eggs produced in the last quarter of 1950 will exceed output in the corresponding period last year. The number of layers on farms this fall probably will average larger than a year earlier, and egg production per bird is expected to continue above the 1949 level. Cold storage stocks of shell and frozen eggs on October 1 totaled 153 million dozen, shell equivalent, about 25 percent larger than on the same date in 1949.

The number of broilers marketed during October-December 1950 is expected to total about 40 percent larger than in the same months last year. Marketings of turkeys from this year's crop for consumption during the holiday season probably will be larger than last year. The turkey crop this year is estimated at 6 percent above the corresponding 1949 output. A larger proportion of this year's crop than last year may be sold for current consumption and relatively less stored for distribution next year. Last year, the Department's price-support program for 1949 crop turkeys encouraged their movement into storage.

Supplies of eggs next year will be more than adequate to permit the rate of civilian per capita consumption to exceed this year's rate of 384 eggs and somewhat stronger consumer demand is probable. Poultry meat supplies will continue large in 1951, with the opportunity for a heavy output of commercial broilers offsetting a possible reduction in the number of chickens marketed from farms. The number of turkeys raised in 1951 for marketing during the latter half of the year will be large, although possibly smaller than the record crop raised this year.

Egg production in the first six or eight months of next year will depend on the number of hens and pullets in laying flocks on January 1, 1951. The prospects are that the number of layers at the beginning of 1951 may be slightly smaller than at the beginning of 1950, but the rate of egg lay per bird is likely to increase further. Egg production during the latter part of the year will depend in part on the extent to which laying flocks will be replaced by pullets hatched during the spring months of 1951.

Chicken meat supplies in 1951 may be slightly larger than a year earlier. If current expectations regarding the number of hens and pullets on farms at the end of 1950 materialize, supplies of mature farm chickens will be almost as large as in the current year. Marketings of young chickens from farms will depend upon the 1951 spring hatch. Commercial broiler output may continue to expand as in the past few years. Almost two thirds of the annual chicken meat supplies come from farm flocks which are maintained principally for egg production, and the balance from commercial broiler production.

Turkey supplies in the first half of 1951 are expected to be a little less than a year earlier because of prospective smaller carry-over stocks from 1950. Supplies from the 1951 turkey hatch will not move to market until later in the year.

The demand for poultry products next year will be strengthened by the general increase in consumer incomes, by the increased proportion of consumer incomes to be spent on food, and by the likelihood of significantly higher prices for red meats, as meat supplies may rise less than the demand for meat. Accordingly, larger quantities of poultry products may be taken by consumers at somewhat higher average prices than in 1950.

Dairy Products

During the remaining months of the year production of milk will be down seasonally and probably a little below the high level of the last quarter of 1949. The number of cows on farms in the middle of 1950 was about the same as a year earlier, and milk production per cow has been only slightly higher than last year.

The utilization pattern of milk in October-December this year will be different than a year earlier. A larger proportion of the output will be consumed as fluid milk and cream, and the quantity used to produce manufactured dairy products, especially butter, will be smaller. Stocks of butter and cheese, however, are higher this fall than last. Civilian consumption of the manufactured dairy products in the last quarter of 1950 is expected to at least equal that of a year earlier. With the market demand for dairy products stronger this fall than last, U. S. Department of Agriculture purchases of these commodities under price-support programs have been cut sharply. As a matter of fact, substantial quantities of butter previously purchased by the Department are being sold back to the trade. Little cheese and nonfat dry milk solids have been sold to the trade, so far this fall.

With production likely to continue at a high level, exports smaller than in recent years, and stocks at the beginning of the year greater than in either of the past two years, total domestic supplies of dairy products in 1951 are expected to reach a new high record, on a milk equivalent basis. Even with larger military purchases for men in armed forces than in the past few years, supplies available for civilians may total 120 billion pounds and per capita consumption of dairy products (in terms of milk equivalent, fat solids basis) may be a little higher than in 1950, although slightly below the prewar (1935-39) average annual rate. The decline from the prewar level results mainly from a reduction in the civilian consumption of butter. On the other hand, civilian consumption per person, as measured in terms of nonfat solids, may exceed the 1950 level, which is 18 percent above the 1935-39 average.

Production of milk on farms in 1951 may be not much different from the 120.5 to 121 billion pounds of the preceding year. The number of cows and heifers on farms probably will be approximately the same as in 1950 and milk output per cow is expected to remain high. However, since prices received by farmers for meat animals and for some other commodities which compete for farmers' resources are likely to increase more rapidly than dairy prices, there will be less incentive to expand milk production. This influence may become evident by the latter half of 1951.

The pattern of milk utilization in 1951 is expected to shift noticeably, with increases from the 1951 level likely in the quantity of milk sold as fluid milk and cream and ice cream, and declines are likely in the use of milk for production of butter and cheese.

U. S. civilian consumption of fluid milk and cream may be somewhat larger than the rate of about 385-390 pounds per person which has prevailed during the past three years. Expenditures by consumers for fluid milk are

practically certain to rise next year. The contribution of price increases to this prospective increase in expenditures will depend in part on the policies of price-determining bodies. Ice cream consumption per capita also is likely to be larger next year, thus ending a four year period of consumption declines.

Butter production is expected to decline in 1951. However, with large Federal Government and commercial stocks on hand, total and per capita consumption by civilians may go up slightly from the 1950 rate. Cheese consumption may reach a record high in 1951. Production is likely to be somewhat lower than in the preceding year, but stocks carried into the new year will be very large. Consumption of evaporated milk was about the same in 1950 as in the preceding year, and no material change from the per capita consumption rate of 1950 is expected in 1951.

Retail prices of dairy products will be higher in 1951 than in the preceding year. The increases for dairy products are not expected to be as much as for some other foods which enjoy high consumer preference, because of large stocks. Furthermore, prices of dairy products usually respond somewhat less rapidly to changes in consumer incomes than do some of the other foods.

Imports of dairy products may be higher than in 1950, but exports probably will be lower. An important factor accounting for the decline in exports of dairy products is the continued expansion in the production of milk in foreign countries, especially in Western Europe.

Fats and Oils

Production of fats and oils used chiefly for food in the year beginning October 1, 1950 is likely to be slightly smaller than the estimated record 8.8 billion pounds produced in 1949-50. This total includes the oil equivalent of soybeans and peanuts exported for crushing. Disappearance of food fats in 1951 is expected to continue near the high level of 1950, reflecting the expected increases in consumer incomes. For calendar year 1950 taken as a whole, civilian disappearance of food fats per person may total about 45 pounds (fat content). This will be the highest annual rate since 1941 and equal to the 1935-39 average. The 1950 disappearance per person may be above the actual consumption rate to some extent, since the former does not allow for inventory building by dealers and large industrial users whose inventories are not reported.

Prices of most food fats and oils in the year beginning October 1, 1950 probably will remain above a year earlier, since consumer incomes and industrial activity will be higher and some decline in output of food fats is expected. Exports of lard, soybeans and soybean oil, probably will remain large.

Production of lard and edible vegetable oils will be at their seasonal peaks this fall and early winter. Soybean oil will constitute a greater percentage of vegetable oil output than a year earlier. Prices of lard and vegetable oils in October were moderately below their high early September

levels, reflecting the seasonal upturn in output. Prices of food fats other than butter this fall and early winter are likely to be moderately below the September level but higher than in the fall and winter of 1949-50.

Output of butter in 1951 probably will be smaller than the 1,675 million pounds produced a year earlier because of the diversions of milk from butter production to those uses which yield the farmer a higher return. However, with large stocks of butter (Government and commercial holdings combined) available at the beginning of the fall and winter season, supplies will be large and civilian consumption per capita is likely to exceed slightly the preceding year's rate of 10.5 pounds. The consumption rate per person will be maintained by the sale of Government-held stocks of butter to the trade. Since supplies from Government stocks are moving back into trade channels, the retail price of butter is expected to remain at about the October level through the first quarter of 1951. For the year as a whole, the retail price of butter is expected to average higher than for 1950.

Lard production in the October year, 1950-51, is expected to exceed the previous year's total output of 2,650 million pounds. The 1950 pig crops are currently estimated to be 4 percent more than the year before. With large supplies available, civilian consumption of lard may show some increase. The retail price of lard is expected to remain low relative to the other cooking fats and oils during this period, and the price increase in prospect for lard may lag behind that of the other products.

Crop conditions on October 1 indicated that the 1950 cotton crop would be almost 40 percent smaller than a year earlier and a moderate reduction of peanut output is expected. The effects of these crop reductions on edible fats and oils output in 1950-51 will not be entirely offset by an anticipated increase of about 25 percent in the soybean crop and a moderate increase in prospect for lard production.

As a result of prospective decline in vegetable oil output, the total output of food products prepared from these raw materials will be lower than last year. Output of margarine, however, may be stepped up still more to meet an expected increase in civilian consumption. This increase in margarine consumption appears likely, even though butter consumption may also show a slight increase during the same period, because of the removal of Federal taxes on colored margarine and strong consumer demand for table fats. The retail price of margarine may increase somewhat next year.

Civilian per capita consumption of shortening next year may be somewhat lower than a year earlier. This reduction is expected on the basis of the large supplies of lard and lower output of the principal vegetable oils. Consumption of the other edible fats and oils--largely cottonseed, soybean, corn, peanut, olive and coconut oils used as cooking and salad oils and mayonnaise and salad dressing and in bakery goods and confectionery--may not decline, as there has been a strong upward trend in this in recent years. Consumption of these oils per capita is setting a new record this year.

Exports of food fats and oils, including the oil equivalent of soybeans and peanuts for crushing abroad, may be nearly as large in the year beginning October 1950 as the estimated 1.3 billion pounds exported a year earlier.

Fruits

Total supplies of fresh and processed fruits available for distribution this fall and winter will not be much different from those of a year earlier. Supplies will include more citrus and cranberries, and less pears, grapes, and some of the canned deciduous fruits. With few exceptions, such as citrus fruits and cranberries, retail prices for fruits are expected to average higher than a year earlier.

Fall and winter season supplies of fresh apples will be about the same as a year earlier, However, less pears and grapes will be available because of smaller crops this year than in 1949 and the large proportion of the crop used for processing. The large crop of cranberries assures plentiful supplies for marketing during the fall and winter and at lower prices than a year earlier. Total production of deciduous fruits in 1950 is about 14 percent smaller than in 1949 and 7 percent below the 1939-48 average.

More fresh citrus fruits will be available this fall and winter than in the same period in 1949-50. The 1950-51 crop of early and mid-season oranges, which will move to market through the coming winter months, is slightly larger than the corresponding 1949-50 crop. Despite damage to the Florida grapefruit crop by the mid-October hurricane, the 1950-51 United States grapefruit crop is expected to be more than a third larger than last year's crop, which also had been damaged by an early season hurricane in Florida and by freezes in Texas. The increased output of grapefruit occurs in Florida and Texas, which are the major producing areas. This year's orange and grapefruit crops also will provide larger supplies for the production of processed citrus products than in 1949-50.

Imports of bananas, which annually account for about one-sixth of the fresh fruit consumed by U. S. civilians, are expected to continue at about the same level as in the past few years. About the usual large quantities of canned pineapple and pineapple juice may be expected from Hawaii during the year 1950-51, which ends next June.

Supplies of tree nuts this fall and winter will be moderately smaller, with retail prices somewhat higher, than a year earlier. The 1950 crops of almonds, walnuts, filberts and pecans are each considerably smaller than the corresponding crops of a year ago. The total output of these four kinds of tree nuts is about 22 percent smaller than in 1949, but a little larger than the 1939-48 average annual production. Supplemental imports of tree nuts probably will be somewhat smaller this year than in the preceding period, with the bulk of the imports being Brazil nuts and cashews. In recent years the civilian per capita consumption of tree nuts has been at the annual rate of about 1.5 pounds (shelled basis).

The 1950-51 pack of canned fruits is expected to total somewhat smaller than production in the preceding year, with the reduction in the pack of deciduous fruits due largely to smaller crops of those fruits

this year. Decreases in the output of canned sweet cherries, peaches, pears, plums and prunes, and berries are expected more than to offset increases in the packs of apricots, sour cherries, and cranberries. The most significant decline is in canned peaches. Larger packs of canned grapefruit segments and citrus salad than in 1949-50 are expected to result from the prospective large increase in grapefruit production, and retail prices for these citrus products will be somewhat lower than last year. About the usual quantities of canned pineapple probably will be available this winter. Military requirements for all canned fruits combined from the 1950-51 pack are much larger than from the preceding season's output; however, they are not sufficiently large to affect seriously the total supplies that will be available to civilians this year. By drawing on carry-over stocks from last year's packs, U. S. civilian per capita consumption of canned fruits during this pack year may be only slightly below the preceding year's rate. Retail prices of canned fruits are expected to average somewhat higher in 1950-51 than in the preceding year, reflecting strengthened consumer demand and higher costs of the raw fruit.

Supplies of canned citrus juices from the new citrus crop will soon start moving to market in large volume. Some increase from last year's level of output is in prospect for the 1950-51 packs of canned grapefruit juice and blended grapefruit-orange juice. The pack of canned orange juice will again be large. Supplies of canned pineapple juice are expected to continue about as large as last winter, but those of grape juice may be a little larger. In 1949-50, because of the smaller pack of canned citrus juices than in the preceding year, U. S. civilian per capita consumption of canned fruit juices was about two pounds below the rate of 15.5 pounds reached in the 1948-49 season. This decline in the consumption of canned fruit juices in 1949-50 was more than offset by an expansion in the consumption of frozen concentrated citrus juices.

Output of frozen fruits and fruit juices is setting a new record this year and leading to record consumption. The present high rate of per capita consumption is likely to continue into 1951. Cold storage stocks of these products on October 1, 1950 totaled 467 million pounds, 31 percent larger than on the same date last year. Most of the increase in 1950 output of frozen fruits and fruit juices has resulted from the doubling of the pack of frozen concentrated citrus juices and large increases in the production of both frozen strawberries and cherries, which more than offset declines in less important items.

Although total supplies of dried fruit in 1950-51 will be smaller than in the past few years, less will be exported so that U. S. civilian per capita consumption of dried fruits in 1950-51 probably will be maintained near the rate of a little over 4 pounds, about the same level as during the past four years. Retail prices, however, are likely to be somewhat higher than those prevailing in 1949-50. Fairly extensive Government assistance has been necessary in recent years to help move the production.

The smaller pack of dried fruits in 1950-51, the smallest in the past 3 decades, reflects both smaller fruit crops and a stronger demand for fruits in other types of utilization. The largest decline is expected in raisins. More of the raisin-variety grapes have been processed into wine and brandy this year than in 1949.

Vegetables

Current indications are that there will be more potatoes, sweetpotatoes, and fresh and frozen vegetables available for consumption this fall and winter than a year earlier. Supplies of dry edible beans and dry peas for domestic distribution will also be large, but supplies of canned vegetables are not as plentiful as a year ago.

Aggregate supplies of truck crops for fresh market shipment this fall are expected to be about 14 percent larger than a year earlier. Output of substantially more cabbage, carrots, lettuce, snap beans, and peas is anticipated, but there will be smaller quantities of cauliflower, celery, cucumbers, and spinach than last year. Carry-over stocks of cabbage, carrots and onions will be moderately larger at the end of 1950 than a year earlier. The acreage for shallots is up sharply from a year earlier, but acreage of winter season cabbage is down somewhat. Retail prices of fresh vegetables this fall and winter are expected to average somewhat below last year's prices.

The indicated production of vegetables for canning and freezing in 1950 is slightly lower than in 1949 as well as below the 1944-48 average. More snap beans, beets, cabbage, peas, tomatoes and pimientos have been grown for processing than last year, but less green lima beans, corn and perhaps spinach. Although requirements of the U. S. military agencies for canned vegetables in 1950-51 are much larger than in recent years, they are not so large as to affect seriously the total supplies available to civilians.

Canners probably will seek larger packs of canned vegetables in 1951 in order to meet the increased military requirements and accelerated civilian demand. Until this output is available, supplies of some canned vegetables--especially canned tomatoes and most tomato products--may be short of the total demand at present prices. Some increases in retail prices for these canned vegetables are likely before the new pack is marketed. The likelihood of larger supplies of fresh vegetables will temper the increases in the retail prices of most canned vegetables. Supplies of frozen vegetables this fall are larger than last year. Cold-storage stocks on October 1, 1950 were about 18 percent larger than a year earlier. Frozen vegetable production in 1951 probably will be about as large as output in 1950. Increases in the prices of frozen vegetables through the first half of 1951 are likely to be moderate.

Potato supplies from the 1950 late crop are even larger than the overly plentiful supplies of a year earlier. Retail prices of potatoes are expected to be lower in this crop year extending well into 1951. The potato crop is likely to be large again next year, according to trends in acreage and yield, and if so, probably will sell at prices considerably lower than this year. Under existing legislation, there will be no price-support on potatoes in 1951.

The sweetpotato crop of almost 60 million bushels is about 10 percent above the 1949 output. It will provide larger supplies for distribution this fall, winter and next spring than were available a year earlier. Retail prices are expected to average moderately lower than those which prevailed during the latter part of 1949 and early 1950.

Supplies of dry edible beans are ample to meet the total demand anticipated for the last quarter of 1950 and the first half of 1951, at prices fairly near the current level. The U. S. Department of Agriculture is making good progress in reducing its large stocks of dry beans. With average weather next year, there should be no difficulty in producing a crop sufficiently large to meet civilian, military and export needs.

Dry peas are a little less plentiful than a year earlier, but supplies are adequate to meet the level of demand experienced in recent years. No substantial increase in the total demand for dry peas is anticipated for 1951.

Grain Products

Prospective supplies and domestic food consumption of grains and cereal food products in the 1950-51 marketing year are about the same as a year earlier. The 1950 rice crop was a near-record. The crops of wheat and corn are lower than in 1949, but large stocks were carried over from the previous marketing year. Supplies are sufficient to provide as large quantities for domestic use for food and nonfood purposes as in the preceding crop year, as well as substantial quantities for export and carry-out stocks. Retail prices of cereal food products probably will average somewhat higher than in 1949-50.

Domestic wheat supplies, (including stocks and 1950 production), are estimated at 1,430 million bushels for 1950-51, only slightly smaller than the large supplies of a year earlier. The stocks of wheat carried into this marketing year on July 1 amounted to 420 million bushels and the 1950 crop is currently estimated at 1,010 million bushels. Wheat crops in recent years have been very large and the 1950 output, although likely to be the smallest since 1943 is larger than any crop before that year.

Food use of wheat by U. S. civilians in 1950-51 is expected to total about 490 million bushels, providing for about the same per capita consumption as in the preceding year. With domestic nonfood use likely to account for about 235 million bushels, and with military procurement and exports (including shipments to U. S. Territories) probably totaling about 260 million bushels, carry-over stocks at the end of 1950-51 may be about 450 million bushels. Although a carry-over of this size would be approximately 10 percent larger than on July 1, 1950 and almost double the average annual carry-over in the period 1932-41, it will represent an important reserve against unforeseen events such as a drought either at home or abroad in 1951-52.

Retail prices of flour and other wheat food products are expected to average slightly higher in 1950-51 than a year earlier. According to the Bureau of Labor Statistics, the urban retail price of wheat flour rose from 49.1 cents per 5 pound sack in June 1950 to 49.7 cents in September; the price of white bread increased from 14.0 cents per one pound loaf in June to 14.6 cents in September. Prior to the increase this summer, the price of bread had remained unchanged at 14.0 cents per pound loaf from March 1949 to June 1950.

Supplies of rye in 1950-51 are expected to be about 40 million bushels, almost 15 percent above those of the preceding year, if imports are as large as in that year. The July 1 stocks were 9.5 million bushels, and production

is estimated at 22.5 million bushels. Although a crop of this size will be about 20 percent larger than the 18.7 million bushel crop harvested in 1949-50, it will be almost one-third smaller than the 1939-48 average.

Civilian consumption of rye cereal products may total about 4.7 million bushels (grain equivalent) about the same as in 1949-50. Even with nonfood use larger in 1950-51 than last, more rye will be available for export and carry-over stocks at the end of the marketing year. Retail prices of rye food products are also expected to average higher in 1950-51 than in the preceding year.

The 1950 rice crop, currently estimated at about 24 million bags (100 pounds) milled basis, is the third largest crop on record, exceeded only by the 1948 and 1949 crops. The anticipated supply would permit U.S. civilians to consume rice at about the previous year's rate of 5.7 pounds per person and still leave a large quantity available both for export and for stock carry-over at the end of the marketing year on July 31, 1951. With political conditions unsettled in the surplus rice producing areas in the Far East, the United States may be called upon to provide sizeable quantities of rice for deficit producing areas of the world. Large reserves of rice in this country would be desirable under these circumstances.

The retail price of rice is expected to average substantially higher in the 1950-51 season than a year earlier. Prices in large cities, according to the Bureau of Labor Statistics, averaged about 17 cents per pound in 1949-50, the lowest since the 1946-47 marketing year. Growers' prices in mid-September were about 20 percent higher than a year earlier.

The supply of corn for 1950-51 is currently estimated at 4.0 billion bushels, 5 percent below the record supply in 1949 -50 and more than one billion bushels larger than in most prewar years. The October 1 carry-over of 859 million bushels set a record, exceeding last year's carry-over by about 34 million bushels. The 1950 crop, although larger than in most prewar years, was 260 million bushels smaller than in 1949. This supply will provide for some expansion in usage by processors of food and nonfood items, heavy livestock feeding, large exports and still leave a substantial carry-over into 1951-52.

Total utilization of corn, including an allowance for quantities to be exported in 1950-51, is expected to be the largest on record. The increase in the amount of corn processed into food products will reflect the increased domestic demand for sugar, starch and sirup. The expected heavy demand for livestock products probably will result in at least as much corn being fed to livestock as the record quantity fed last year. This stronger demand is expected to lead to higher prices both for the food and nonfood products.

More barley and oats will be available this year than in 1949-50. Civilian consumption of barley and oat food products is not expected to be much different in 1950-51 than a year earlier. However, with a strong demand in prospect for these grains, the retail prices of the food products--principally malt and oat cereals--probably will increase, at least through the first half of 1951.

Exports of corn, oats and barley are expected to be larger in 1950-51 than in the preceding marketing year. Almost all of the increase will be in corn since not much change from the 1949-50 export level is expected for oats and barley. Last year, total imports of oats and barley from Canada practically offset exports of these grains from the United States. This situation is expected again in 1950-51. Exports of corn, oats and barley are currently used primarily for livestock feed, although in some countries considerable quantities are processed into food. The larger exports of corn are in prospect because of the very small Argentine corn crop. The United States will be the principal source of corn for deficit feed producing countries until the Argentine crop is harvested next spring.

Sugar

Distribution of sugar by primary distributors for consumption in the United States for the period January-September 1950 totaled 6,574 thousand short tons (raw value), about 10 percent above distribution for the same period of 1949. However, September was the first month since January when distribution went below the 1949 rate. This trend continued into early October. Nevertheless, it is expected that total domestic sugar distribution in 1950 will reach record levels. Per capita disappearance of sugar in 1950 may amount to as much as 96 to 100 pounds, the highest since 1941, but some accumulation of household stocks will probably have occurred.

The Department of Agriculture raised the 1950 quota for consumption from 7,500 to 8,700 thousand short tons by successive increases of 350 thousand short tons on July 13 and 850 thousand short tons on August 23. Under the provisions of the Sugar Act of 1948, the Department is required to announce a quota for consumption for the calendar year 1951 before December 31, 1950.

Total stocks of sugar (visible and invisible) at the end of 1950 are likely to be the highest since the end of 1947, although somewhat below the record stocks at the end of 1941. As of September 30, 1950, stocks held by distributors (except mainland cane mills) were 603 thousand short tons, almost 200 thousand tons greater than a year earlier. Distributors' stocks increased in September 1950, in contrast with a decrease in September 1949. On August 31, 1950, distributors' stocks were 21 percent below those on August 31, 1949. Deliveries of sugar for export in 1950 are expected to be considerably below 1949 levels, continuing a downward trend for the fourth consecutive year.

Average net wholesale prices of refined sugar at New York rose from 7.55 cents per pound in April to 8.06 cents in August, but in recent weeks the market has been steady. The average retail price in large cities per five pounds rose from 47.1 cents in June to 50.7 cents in August.

World production of beet and cane sugar for the 1949-50 season is now estimated at 38 million short tons (raw value), about two percent more than the previous record crop produced in 1948-49 and 10 percent more than the 1935-39 average. Output in areas supplying the United States in 1949-50 was 11,211 thousand short tons (raw value), about 5 percent above 1948-49. Preliminary indications from some of the offshore areas indicate the likelihood of further increases in the 1950-51 season.

THE WORLD FOOD OUTLOOK FOR 1950-51 1/

World food supplies for the current season are expected to be slightly larger than in 1949-50 when they exceeded the prewar level by about 2 percent. Small increases are in prospect for the breadgrain crop, presently estimated at 4 percent above the 1935-39 average, and breadgrain stocks in the principal exporting countries are somewhat above the level of a year ago. The early outlook for rice, the other major food grain, indicates a crop at least as large as last year. Present prospects also indicate a considerable rise in the production of sugar and potatoes. While output of vegetable oils may show little change from last year, the outlook for a continued increase in animal fats and, in fact, all livestock products, appears favorable but depends on whether pasture conditions are average or better throughout the season. Feed grain supplies should be up, with increases in barley and oats outweighing a decrease in the corn crop. Stocks of coarse grains in the principal supplying countries, however, are estimated slightly below a year ago.

The expected increase in world food supplies in 1950-51 is too small to permit any significant return to the level of prewar per capita consumption for the world's population, now 14 percent more numerous than in prewar times. It is even probable that not all of the increased supplies available will pass into consumption, since shipments from surplus to deficit areas are still hampered by shortages of dollar exchange and by guerrilla warfare and transportation difficulties in some areas.

In Europe, traditionally the great food importing area of the world, prospects for some further improvement in the food situation are good, except in the Danube Basin region where spring-sown crops were badly damaged by a late spring and summer drought. Yugoslavia and perhaps Hungary, which exported over 500,000 tons of corn and other grains to the west in 1949-50 (and an annual average of over 1,000,000 tons in 1934-38), will need to import substantial quantities of grain in 1950-51 if the food situation is not to deteriorate.

In spite of the poor 1950 harvest of spring-sown crops in the Danube Basin region, food production in Europe is likely to show an increase in 1950-51. Coarse grain output is down and breadgrain output about the same as last year when it reached an estimated 95 percent of prewar. Considerably larger crops of sugar beets, potatoes and feed roots are in prospect. More hay has been harvested. Livestock numbers are continuing to increase and, if pasture conditions this season are at least average and imports of concentrated feed are obtained in sufficient quantities, output of livestock products probably will continue to expand. Production of pork, milk and eggs have already risen in some countries in West Europe to levels in excess of demand at the current high prices, but the disposal problem may be eliminated as a result of the recently-adopted rearmament programs. In any event, West Europe should be able to reduce food imports without halting improvements in the food situation. The reduction in imports may not be as great as would be warranted by a consideration of current supplies alone, for a number of countries are proposing to build up security stocks.

1/ Prepared by the Office of Foreign Agricultural Relations.

The food situation in most of Europe in 1950-51 probably will be characterized more by increased per capita consumption of milk, meats, fats, cheese and eggs, still below prewar in a number of countries, rather than by any marked increase in the total quantity of food consumed. Consumption in terms of calories is already close to the prewar average in the great majority of European countries, and within 5 percent of prewar in nearly all the rest. Food rationing has been abandoned in France, Western Germany, Belgium, the Netherlands, Italy, Sweden, Hungary and Poland, but elsewhere it is retained for two or more items, most frequently fats and sugar.

In the Soviet Union the food situation has shown an improvement in the last two years. Little change is in prospect for 1950-51. Production of grain, still below the prewar average, is expected to be slightly less in 1950 than in 1949, with breadgrain output down somewhat and feed grains showing little change. Present indications are that root crops are as good as or better than last year. Numbers of livestock collectively held have increased considerably, though this increase may have been offset by a decrease in noncollectively held livestock numbers. The feed situation appears to be difficult. Nevertheless, the Soviet Union, which exported over 1.5 million tons of grain in 1949-50, mainly to West Europe but also to the satellites and some other areas, may be expected to continue wheat and feed grain exports of a similar or even larger amount in 1950-51, if special trade deals can be made with importing countries.

An export surplus of grain is also expected from the Middle East in 1950-51. Grain production in Turkey, which had a poor growing season last year, recovered sharply in 1950, and record crops were harvested in Iraq and Syria. Whether or not the indicated surpluses will all be exported or partly used to build up reserves is not certain. Statistically, the surpluses would appear about equal to the import requirements of the area. The Middle East will also have substantial surpluses of such traditional food export items as dried fruits and nuts, but as usual will import most of its sugar requirements. Among the countries of this region, the food situation is particularly tight in Israel because of a rapid increase in population resulting from active immigration during the last two years.

The Far East, which before the war exported yearly over 2 million tons of grain, mostly rice, to the rest of the world, will again need to import three or four times that much grain if food supplies are to be maintained at the 1949-50 level. The grain deficiency in the Far East since the war is due chiefly to the rapid growth of its population and to the drop in rice exports from the surplus to the deficit regions of Eastern Asia.

Indications are that the exportable surplus of rice in Burma, Thailand and Indochina during the current season may be about as large as the postwar peak reached in 1949-50, or only 3 million tons as compared with an annual average of between 6 and 7 million tons before the war. Rice production in this region has dropped largely as a result of local disturbances which have put thousands of acres of

rice-lands out of cultivation in Burma and Indochina and disrupted normal channels of distribution. Exports from Indochina have virtually ceased except for some shipments to the French Union, and exports from Burma have been running slightly below the level attained a year ago.

Competition for the available supplies of rice has been severe this year following the end of allocations of export surpluses by the International Emergency Food Committee on December 31, 1949. A large percentage of the rice exported from Burma, Thailand and Indochina in 1950-51 probably will go to Japan which, with the recovery of its manufacturing industries, is in a position to outbid less favorably situated nations of the Far East. In addition, Japan will need to import substantial quantities of other grains to supplement domestically-produced food supplies even if the present good crop prospects are realized.

Most of the other traditional rice-deficit countries, including China, Pakistan, Malaya, Indonesia and the Philippines, have also had a reasonably good growing season, and indigenous supplies of foodstuffs will be about normal. India, however, has suffered crop damage from both floods and droughts, and is again in need of large imports. To cover their import requirements, some of these countries may have to rely more on wheat, corn and sorghums than in the past year.

The food situation in Korea has been complicated by full-scale warfare in recent months. After having resumed exports of rice to Japan in 1949 for the first time since the end of World War II, Korea must once more import food. Though crop prospects are still good, sizeable imports may be needed to stave off food shortages in the larger cities because of the destruction of marketing and storage facilities.

The older British Dominions will as usual cover a part of the deficit of food-importing countries, especially the United Kingdom. Canada harvested a larger crop of wheat, rye, barley and oats in 1950 than in 1949, but frost damage has lowered significantly the quality of grain. Unless growing conditions in Australia are as exceptionally favorable for the coming crop as they were in 1949-50, Australian grain production is likely to drop below last year's level. An increase in the Canadian potato crop is in prospect, but apple and pear production is down. Livestock numbers in Canada, Australia and New Zealand generally show an upward trend, and meat output is expected to increase slightly in all three Dominions.

Prospects for grain exports from Latin America depend mostly on the Argentine crop. Argentina anticipates some increase, possibly 15 to 20 percent, in wheat acreage, partly at the expense of other grains. Given average weather conditions, corn as well as wheat output should increase in 1950-51 as compared with last year when drought cut the corn crop to extremely low levels. Flaxseed production is also expected to be up from last year. Livestock numbers in Argentina, Uruguay and Southern Brazil were reduced by the 1949-50 drought which will tend to restrict meat exports. Moreover, meat consumption in these countries is increasing, and shipments from Argentina and Uruguay to the United Kingdom have been suspended because of failure thus far to reach an agreement on prices. Quantities of sugar available for export in the Caribbean area should be at least as large as last year unless present prospects for Cuban production fail to materialize.

DISTRIBUTION OF UNITED STATES FOOD, 1949-50 1/

The analysis of the distribution of United States food supplies from July 1, 1949 to June 30, 1950 indicates that:

(1) Civilian per capita food consumption in the 1949-50 fiscal year was 11 percent above the prewar (1935-39) average annual rate.

(2) Food exports of about 34.9 billion pounds in 1949-50, although more than 3 1/2 times the prewar (1935-39) average annual rate, were the lowest since the war, almost 30 percent below the 1948-49 level.

U.S. civilian per capita food consumption high in 1949-50:

With food production sustained at a high level in the 1949-50 fiscal year, total civilian per capita consumption of food in the United States continued at about the same rate as in 1948-49 and well above (11 percent) the prewar (1935-39) average annual rate (table 5). The decline in food exports in 1949-50 compared with a year earlier had little, if any, effect on the level of civilian per capita food consumption since the reduction in exports occurred mainly in wheat and wheat products, domestic supplies of which had been plentiful since 1946.

Domestic demand for food in 1949-50 was about the same as in the preceding year as a result of continued high level of general economic activity, employment, and flow of income to consumers. Only minor changes from 1948-49 occurred in the per capita consumption of individual major foods.

U.S. civilians took over 85 percent of food distributed in 1949-50:

On a physical quantity basis, civilians in the United States took 87.1 percent of the total amount of United States food distributed during fiscal year 1949-50 (table 6). Exports, which include military shipments of food to occupied areas, accounted for 11.7 percent of the total distribution, U. S. military services took 0.8 percent for use of troops stationed at home and abroad, and the territories of the United States received 0.4 percent.

U. S. civilian disappearance accounted for practically the entire distribution of many important foods. Civilians took 97 percent of the meat distributed in 1949-50, 96 percent of the cheese, 99 percent of the sugar, 98 percent of the fresh and processed vegetables, 94 percent of the fresh and processed fruits, 94 percent of the potatoes, and 96 percent of the eggs. Among the other major foods, civilian disappearance was equivalent to 91 percent of the condensed and evaporated milk (combined), about 85 percent of both the edible fats and oils (including butter) and dry edible beans and peas, and 81 percent of the peanuts.

1/ Prepared jointly by the Bureau of Agricultural Economics, the Office of Foreign Agricultural Relations, and the Production and Marketing Administration.

Table 5.- Civilian per capita consumption of food, United States, fiscal years 1949-50, 1948-49, 1947-48, 1946-47, and 1945-46 and average 1935-39 1/

Commodity	Consumption per capita					
	Fiscal year 1949-50	Fiscal year 1948-49	Fiscal year 1947-48	Fiscal year 1946-47	Fiscal year 1945-46	Prewar year 1935-39
	Index 1935-39=100					
Index of per capita consumption of all foods 2/	111	110	113	116	116	100
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
Wheat flour and other wheat cereal products (grain equivalent)	194	195	202	204	210	226
Other grains and grain products--total	42.9	43.6	43.5	46.4	49.6	47.7
Corn and corn products (grain equivalent) 3/	31.0	31.3	31.2	33.9	35.5	36.0
Oats, barley, rye, and grain sorghums (grain equivalent) 4/	11.9	12.3	12.3	12.5	14.1	11.7
Rice (milled basis)	5.7	4.8	4.8	5.8	4.0	5.6
Fats and oils, edible--total (product weight)	46.3	45.8	45.8	43.7	41.2	48.6
Butter	10.5	10.4	10.2	11.5	10.6	16.7
Lard	12.0	12.2	12.9	11.8	11.7	11.0
Margarine	5.5	5.7	5.9	4.2	3.6	2.9
Shortening and other edible fats and oils	18.3	17.5	16.8	16.2	15.3	18.0
Meats (carcass weight equivalent) 5/	144.1	143.3	150.4	154.5	155.5	126.2
Dairy products:						
Fluid milk and cream 6/	390	382	390	395	436	340
Cheese	7.2	7.0	6.8	7.2	6.2	5.5
Condensed and evaporated milk	19.6	19.4	21.1	19.0	17.8	16.7
Dried milk	3.6	3.3	3.7	3.0	3.6	2.0
Other foods:						
Potatoes and sweetpotatoes	117.9	117.2	136.8	140.8	146.9	152.4
Dry beans and peas	8.5	8.2	8.5	8.5	8.1	9.4
Sugar, beet and cane (refined)	95.7	95.0	96.3	79.5	67.8	97.0
Eggs (shell equivalent)	48.3	48.6	47.4	47.3	47.3	37.3
Fruits--total	162	164	181	192	172	163
Fresh (farm weight)	121	122	137	147	131	138
Processed (product weight)	41.1	42.4	43.7	45.4	41.5	25.4
Vegetables--total (excluding potatoes and sweetpotatoes)	288	296	294	311	309	265
Fresh (farm weight)	246	256	252	265	262	235
Processed (product weight) 7/	42.4	40.1	42.2	45.9	47.4	30.3
Peanuts (farmers stock equivalent, excluding oil)	6.4	6.1	6.6	7.6	9.3	6.4
Soybeans (excluding oil)	1.0	.8	.7	1.2	1.1	8/
Miscellaneous 9/	216.2	213.1	218.7	234.9	249.1	184.2

1/ Data prior to 1949-50 are revised to correspond with those in "Supplement for 1949 to Consumption of Food in the United States, 1909-48," USDA Misc. Publ. 691. 2/Weighted by average retail prices for 1935-39. 3/Excludes quantities consumed as corn sugar, corn sirups, and alcoholic beverages. 4/Includes grain equivalent of oatmeal and rye flour; excludes grains used for alcoholic beverages. 5/Excludes offals. 6/In other tables of this report, fluid milk and cream are included with "other foods--miscellaneous." 7/Excludes canned baby foods and soups. 8/Less than .05 pounds. 9/Includes meat offals, poultry, fish, corn and maple sugars, sirups, honey, dairy products (not elsewhere specified), coffee, tea, cocoa, canned baby foods and soups, etc.

Table 6.- Distribution of United States food supplies: U. S. civilian, U. S. military, U. S. territories, and exports, fiscal year, 1949-50

Commodity	Total food distribution 1/	Percent of total food distribution			
		U. S. civilians	U. S. military	U. S. territories 2/	Exports 3/
	Mil. lb.	Percent	Percent	Percent	Percent
Total food	297,413	87.1	.8	.4	11.7
Wheat and wheat products (grain equivalent)	47,423	61.2	.5	.5	37.8
Other grains--total (grain equivalent)	16,218	39.8	---	.6	59.6
Corn and corn products	10,912	42.6	---	.5	56.9
Barley, oats, rye and grain sorghums	5,306	34.0	---	.6	65.4
Rice (milled basis)	2,256	38.2	---	16.8	45.0
Fats and oils, edible (including butter)	8,209	84.5	.8	1.0	13.7
Meats (carcass weight equivalent)	22,223	97.3	1.8	.5	.4
Dairy products (product weight)					
Cheese	1,122	96.3	.8	.4	2.5
Condensed and evaporated milk	3,222	91.4	.7	1.0	6.9
Dried milk	866	61.8	.2	2.3	35.7
Other foods					
Potatoes and sweetpotatoes (farm weight equivalent)	18,774	94.3	1.6	.4	3.7
Dry beans and peas (including indirect uses)	1,482	86.0	.3	3.9	9.8
Sugar (refined)	14,517	99.0	.6	---	.4
Eggs (shell equivalent)	7,552	96.0	1.1	.1	2.8
Fruits - total	26,132	93.7	.9	.3	5.1
Fresh (farm weight)	19,045	95.2	.6	.2	4.0
Processed (product weight)	7,087	89.7	1.6	.5	8.2
Vegetables - total (excluding potatoes and sweetpotatoes)	45,543	97.9	.7	.2	1.2
Fresh (farm weight)	37,553	98.2	.5	.1	1.2
Processed (product weight)	7,990	96.5	1.8	.8	.9
Peanuts (farmers' stock equivalent, excluding oil) 4/	1,183	80.9	.1	---	19.0
Soybeans (excluding oil) 4/	1,165	12.3	0	---	87.7
Miscellaneous 5/	79,526	98.3	.9	---	.3

1/ Equals production plus imports and carry-in stocks minus domestic non-food use, duplication, and carry-out stocks. Data take into account U. S. military stocks, accumulated prior to July 1, 1949 and used for civilian relief feeding progams, in occupied areas during fiscal 1949-50. 2/ Partly estimated. 3/ Includes exports of food by U. S. military for civilian relief feeding programs in occupied areas. 4/ Excludes quantities crushed in the United States for oil for domestic consumption and export; includes exports of (a) peanuts and soybeans for all uses, and (b) the bean equivalent of soya flour and meal. 5/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, sirups, honey, tree nuts, coffee, tea, cocoa, fluid milk and cream, other dairy products (not elsewhere specified), etc.

Postwar low level in food exports from the United States:

Total food exports of 34,863 million pounds in 1949-50 were about 30 percent smaller on a poundage basis than a year earlier and the lowest since the end of World War II. This represents the first decline in annual food exports from this country since the postwar period, and was principally the result of the vastly improved food supply situation abroad, as compared with the preceding postwar years. Government financing under the European Recovery Program and for relief in occupied areas (GARIOA) accounted for about 60 percent of the value of exports.

Table 7.- Summary of food exports from the United States, by major food groups, average 1935-39 and fiscal years 1945-46, 1946-47, 1947-48, 1948-49 and 1949-50

Period	Total food exports	Wheat and wheat products (grain equiv.)	Other grains (grain equiv.)	Rice (milled)	Fats and oils 1/	Meats (carcass equiv.)	Dairy products (product weight) 2/	Other foods
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
1935-39 av.	9,460	3,060	2,991	186	195	123	38	2,867
1945-46	38,973	23,565	2,931	782	705	1,375	1,773	7,842
1946-47	42,948	23,901	9,330	860	509	405	1,107	6,836
1947-48	43,323	29,148	4,998	911	562	152	1,030	6,522
1948-49	49,072	30,188	9,598	914	891	75	872	6,534
1949-50	34,863	17,927	9,669	1,013	1,122	94	558	4,480

1/ Includes butter.
2/ Excludes butter.

Exports of cereal products including rice totaled 28,609 million pounds, 30 percent below 1948-49, with the decline in wheat and wheat products more than offsetting increases for the other grains and grain products and rice. Declines also occurred for dairy products and "other foods".

Grains, including rice, accounted for 82 percent of the total export poundage. Wheat and wheat products represented 51 percent; rice, almost 3 percent; and other grains, 28 percent. These products, in total, were as large a proportion of total food exports in 1949-50 as in the preceding year. Grain exports in 1949-50 included a relatively larger quantity to be used for animal feed than in the earlier postwar periods.

Wheat and wheat products (grain equivalent) exports of 17,927 million pounds (approximately 300 million bushels) were the smallest since the end of World War II although almost six times the prewar 1935-39 average (table 7). Exports accounted for 38 percent of the total distribution of United States wheat for food use in 1949-50.

Exports of corn and corn products amounted to 6,202 million pounds (grain equivalent), almost 20 percent above the 1948-49 level. These exports represented over 55 percent of the total distribution of corn other than domestic nonfood use. The export of barley and malt, grain sorghums, oats and oatmeal, and rye and rye flour in 1949-50 totaled 3,467 million pounds (grain equivalent) -- 20 percent lower than a year earlier but approximately 5 times the prewar (1935-39) average annual rate. These exports in 1949-50 accounted for 65 percent of the total distribution of these grains other than domestic nonfood use. Rice exports of 1,013 million pounds (milled basis) were 11 percent greater than in 1948-49. These exports, equivalent to 45 percent of the total distribution of United States supplies of rice for use as food, went principally to Cuba where rice is a particularly important item in the diet.

The milling by-products of the flour and other grain products remained in this country for feed use. A summary of grain and grain products exports follows:

Fiscal year 1949-50

Exported as grain:

	Million pounds	Million bushels
Wheat	15,522	258.7
Corn	5,973	106.7
Rye	325	5.8
Oats	396	12.4
Barley	881	18.4
Grain sorghums	1,574	28.1
Total	24,670	430.1

Exported as grain products:

	Million pounds product weight	Million bushels grain equivalent
Wheat flour	1,705	39.7
Semolina	6	.1
Macaroni	11	.3
Rice, milled rough equiv.	1,013	34.6
Corn meal	15	.5
Corn grits	37	1.3
Corn starch and flour	82	2.3
Oatmeal	43	3.2
Malt	108	3.2
Sorghum starch	20	.6
Total	3,040	85.8
Total excl. rice	2,027	51.2

Total grain and grain products exports, excluding rice -- 481.3 million bushels, grain equivalent.

Fats and oils exports of 1,122 million pounds were 26 percent larger than in 1948-49 and almost six times the prewar (1935-39) average annual rate. The large domestic supply of animal fats and vegetable oils made it possible for the United States to export these commodities.

Meat exports of 94 million pounds (carcass equivalent) in 1949-50 were almost one-fourth greater than in the preceding year although not as large as in the other postwar years and the prewar (1935-39) average annual rate. The quantity of meat distributed during 1949-50 was slightly larger than in 1948-49. Most of this increase was taken by civilians in the United States.

Exports of cheese, canned milk and dried milk in 1949-50 totaled 558 million pounds. This was about 35 percent smaller than in the preceding fiscal year and the lowest annual export since the end of the war in 1945. Of the total distribution in 1949-50, exports accounted for only 2 percent of the cheese and 7 percent of the canned milk, but 36 percent of the dried milk.

Aggregate exports of other foods -- principally fruits, vegetables, potatoes, and soybeans -- amounted to 4,480 million pounds, about one-third smaller than in 1948-49. Peanuts and soybeans exports were mainly for crushing for oil.

E. R. P. countries received most of United States food exports:

Most of the food exported from the United States in 1949-50 went to countries participating in the European Recovery Program (table 9). These countries received a total of 21,325 million pounds, 61.2 percent of total food exports from the United States. Non-participating European countries received 516 million pounds (1.5 percent of total exports); Africa, 298 million pounds (0.8 percent); Asia, 6,681 million pounds (19.2 percent); Oceania, 5 million pounds (less than 0.5 percent); and areas in the Western Hemisphere received 6,038 million pounds (17.3 percent).

The Bizone area of Germany received more of the foods exported from the United States than any other country. Most of the exports were financed through the Economic Cooperation Administration and funds appropriated for relief in occupied areas (GARIOA). The Bizone was the largest recipient of wheat and wheat products (4,704 million pounds), other grains and grain products (3,140 million pounds), and fats and oils (312 million pounds). Relatively smaller quantities of dairy products and "other foods" were shipped to this destination.

Food exports to Japan, Korea and the Ryukyu Islands totaled 4,876 million pounds, the second largest quantity shipped to foreign destinations. The bulk of the exports to this Far Eastern area was wheat and wheat products (3,512 million pounds), other grains and grain products (819 million pounds), and "other foods" -- most of which were soybeans and soybean products other than oil -- (414 million pounds).

Other areas which received substantial quantities of food from this country in 1949-50 were the Latin American Republics (3,192 million pounds), Canada (2,536 million pounds), the Netherlands (2,087 million pounds), Austria (1,881 million pounds), and the United Kingdom (1,822 million pounds).

Exports by U. S. military for civilian relief abroad smaller but still important:

Since the end of the war in 1945, exports of food by military agencies for civilian feeding in occupied areas abroad have been large. These exports in 1949-50, although accounting for more than one-fourth of the total food exports from the United States, were less than half as large as the corresponding quantity moved in 1948-49. This decline in military exports resulted principally from the fact that the responsibility for providing food to the European area from funds appropriated for relief in occupied areas (GARIOA) was transferred from military to civilian administration.

On an individual commodity basis, military exports of some foods under foreign aid programs were also important in 1949-50 accounting for the following proportion of their corresponding total exports: Wheat and wheat products, 40 percent; barley, 44 percent; rye, 65 percent; grain sorghums, 34 percent; nonfat dry milk solids (dry skim milk), 33 percent; dry field peas, 60 percent; soybeans and soybean products (other than oil), 44 percent.

U. S. Department of Agriculture procured major part of foods exported in 1949-50:

Almost 55 percent of the total food exports were procured through the U. S. Department of Agriculture, either specifically for export programs or under price-support operations. As in recent years, U. S. military agencies and countries receiving financial assistance through the Economic Cooperation Administration depended upon the Department of Agriculture for procurement of many of the foods exported.

Among the major commodities, the Department of Agriculture bought over 65 percent of the wheat and wheat products exported, about 50 percent of the other grains and grain products; more than 95 percent of the nonfat dry milk solids (dry skim milk); 60 percent of the dry field peas; 65 percent of the potatoes (including the raw material equivalent of potato flour); 50 percent of the soybeans and soybean products other than oil; and almost 90 percent of the eggs.

Table 8.- Food exports from the United States, by major groups, fiscal years 1949-50, 1948-49, 1947-48, 1946-47 and 1945-46 and average 1935-39 1/

Commodity	Fiscal year 1949-50	Fiscal year 1948-49	Fiscal year 1947-48	Fiscal year 1946-47	Fiscal year 1945-46	Prewar average 1935-39
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Total exports	34,863	49,072	43,323	42,948	38,973	9,460
Wheat and wheat products (grain equiv.) 2/	17,927	30,188	29,148	23,901	23,565	3,060
Other grains - total (grain equiv.)	9,669	9,598	4,998	9,330	2,931	2,991
Corn and corn products 3/	6,202	5,235	2,234	6,704	1,268	2,296
Barley, oats, rye, and grain sorghums 4/	3,467	4,363	2,764	2,626	1,663	695
Rice (milled basis)	1,013	914	911	860	782	186
Fats and oils, edible (including butter)	1,122	891	562	509	705	195
Meats (carcass weight equivalent)	94	75	152	405	1,375	123
Dairy products (product weight)						
Cheese	28	151	104	158	299	1
Condensed and evaporated milk	221	427	563	638	1,083	31
Dried milk	309	294	363	311	391	6
Other foods:						
Potatoes and sweetpotatoes (farm weight equivalent)	704	2,061	1,013	900	1,633	116
Dry beans and peas (including indirect uses)	146	315	534	500	862	54
Sugar (refined)	53	99	243	557	792	195
Eggs (shell equivalent)	210	89	326	536	608	3
Fruits -- total	1,336	1,456	1,946	2,237	1,671	1,922
Fresh (farm weight)	758	802	1,071	1,410	1,044	1,197
Processed (product weight)	578	654	875	827	627	725
Vegetables - total (excluding potatoes and sweetpotatoes)	525	392	431	669	1,224	134
Fresh (farm weight)	452	307	260	473	937	92
Processed (product weight)	73	85	171	196	287	42
Peanuts (farmers' stock equivalent excluding oil) 5/	224	684	532	279	99	1
Soybeans (excluding oil) 5/	1,022	1,109	1,160	646	533	240
Miscellaneous 6/	260	329	337	512	420	202

1/ Excludes shipments to the noncontiguous territories of the United States. Data prior to 1949-50 are revised to correspond with those in "Supplement for 1949 to Consumption of Food in the United States, 1909-48", USDA Miscellaneous Publication No. 691.

2/ Excludes exports of flour milled in bond.

3/ Excludes quantity shipped to Canada for storage.

4/ Includes malt, oatmeal and rye flour; excludes quantity shipped to Canada for storage.

5/ Exports of peanut oil and soybean oil included with edible fats and oils, above. Soybeans includes bean equivalent of soya flour and meal exports.

6/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, honey, tree nuts, coffee, tea, cocoa, and fluid milk and cream.

Table 9.- Food exports from the United States, by destination, fiscal year 1949-50 1/

Destination	Total	Wheat and wheat products (grain equiv.)	Other grains and products 2/ (grain equiv.)	Rice (milled basis)	Fats and oils 3/	Meats 4/ (carcass weight)	Dairy products 5/ (product weight)	Other foods 6/
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total food exports	34,863	7/17,927	7/ 9,669	1,013	1,122	94	558	4,480
Europe - total 8/	21,841	11,968	6,993	71	698	23	240	1,848
ERP participating countries - total	21,325	11,798	6,955	71	633	23	200	1,645
Austria	1,881	1,225	459	5	106	*	4	82
Belgium and Luxembourg	1,235	609	334	27	57	1	17	190
Denmark	495	54	289	*	*	0	0	152
France and French North Africa	549	40	475	1	*	*	3	30
Germany	8,688	4,704	3,140	2	312	5	68	457
Greece	1,280	1,091	47	23	10	4	61	44
Iceland	28	18	*	1	4	0	0	5
Ireland	831	170	647	0	2	0	*	12
Italy and Trieste	742	585	25	*	51	*	26	55
Netherlands	2,087	1,207	710	1	47	9	*	113
Norway	683	341	293	*	*	*	0	49
Portugal	515	421	27	0	0	*	*	67
Sweden	31	0	*	0	2	*	0	29
Switzerland	158	2	54	11	28	*	*	63
Turkey	300	300	*	0	*	*	0	*
United Kingdom	1,822	1,031	455	*	14	4	21	297
Other European countries - total	516	170	38	*	65	*	40	203
Spain	404	157	4	0	41	0	*	202
U.S.S.R.	*	0	*	0	0	0	0	0
Other 9/	112	13	34	*	24	*	40	1
Africa - total 10/	298	103	168	*	6	*	5	16
Asia - total	6,681	4,260	1,108	297	38	10	191	777
China	1	0	0	0	0	*	1	*
India	175	56	112	0	0	*	3	4
Pakistan	2	0	*	0	0	0	2	*
Japan, Korea and Ryukyu	4,876	3,512	819	65	20	2	44	414
Philippine Republic	708	262	94	43	5	4	105	195
Other 11/	919	430	83	189	13	4	36	164
Oceania - total 12/	5	1	*	1	*	*	*	3
Western Hamisphere - total	6,038	1,595	1,400	644	380	61	122	1,836
Canada 13/	2,536	40	1,048	47	134	18	*	1,249
Latin American Republics	3,192	1,382	312	561	234	36	115	552
Other 14/	310	173	40	36	12	7	7	35

1/ Excludes shipments to the noncontiguous territories of the United States.

2/ Includes corn and corn products (except corn sugar and sirups), barley and malt, oats and oatmeal, rye and rye flour, and grain sorghums. See table 10 for commodity details.

3/ Includes butter, lard, margarine, shortening, and other edible fats and oils.

4/ Meat offals and horsemeat are included with "other" foods.

5/ Includes cheese, condensed and evaporated milk, dried whole milk, and nonfat dry milk solids. See table 11 for commodity details.

6/ Includes potatoes and sweetpotatoes, dry beans and peas, sugar, eggs, fresh and processed fruits and vegetables, peanuts, and other foods. See table 12 for commodity details.

7/ Excludes quantities shipped to Canada for storage.

8/ Including French North Africa (i.e., Algeria, French Morocco, and Tunisia) and Turkey.

9/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania, Yugoslavia, Estonia, Latvia, Lithuania, Azores, Gibraltar, Malta, Gozo and Cyprus.

10/ Excluding French North Africa.

11/ Syria, Lebanon, Iraq, Iran, Israel and Palestine, Jordan, Kuwait, Saudi-Arabia, Arabian Peninsular States n.e.s., Aden, Bahrein, Afghanistan, Ceylon, Burma, Thailand, French Indo-China, French India, British Malaya, Indonesia, Portuguese Asia, Southern and Southeastern Asia n.e.s., Hong Kong and Taiwan (Formosa).

12/ Australia, New Zealand, New Guinea, British West Pacific Islands, French Pacific Islands, Western Pacific Islands n.e.s.

13/ Including Newfoundland and Labrador.

14/ Miquelon and St. Pierre, British Honduras, British West Indies, Netherlands Antilles, French West Indies, British Guiana, French Guiana, Surinam, Falkland Islands, and Greenland.

* Less than 500 thousand pounds.

Table 10.- Exports of grains other than wheat and rice from the United States, by destination, fiscal year 1949-50 1/

Destination	Other grains - total (grain equiv.)	Corn and corn products 2/ (grain equiv.)	Barley and malt (grain equiv.)	Oats and oatmeal (grain equiv.)	Grain sorghums (grain equiv.)	Rye and rye flour (grain equiv.)
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total exports	3/ 9,669	3/ 6,202	3/ 1,036	499	1,607	325
Europe - total 4/	6,993	4,639	392	356	1,281	325
ERP participating countries - total	6,955	4,601	392	356	1,281	325
Austria	459	390	62	7	0	0
Belgium and Luxembourg	334	186	63	58	27	0
Denmark	289	289	0	0	0	0
France and French North Africa	475	457	18	0	0	0
Germany	3,140	1,454	125	67	1,196	298
Greece	47	11	0	36	0	0
Iceland	*	*	*	*	0	0
Ireland	647	647	0	0	*	0
Italy and Trieste	25	25	*	0	*	0
Netherlands	710	443	90	177	0	0
Norway	293	237	0	0	56	0
Portugal	27	*	0	0	0	27
Sweden	*	*	0	0	0	0
Switzerland	54	7	34	11	2	0
Turkey	*	*	0	0	0	0
United Kingdom	455	455	0	0	0	0
Other European countries - total	38	38	*	0	0	*
Spain	4	.4	0	0	0	0
U.S.S.R.	*	*	*	0	0	0
Other 5/	34	34	0	0	0	*
Africa - total 6/	168	159	7	2	0	0
Asia - total	1,108	291	482	9	326	*
China	0	0	0	0	0	0
India	112	*	0	0	112	0
Pakistan	*	*	0	*	0	0
Japan, Korea and Ryukyu	819	172	461	1	185	*
Philippine Republic	94	87	3	4	0	0
Other 7/	83	32	18	4	29	0
Oceania - total 8/	*	*	*	0	0	0
Western Hemisphere - total	1,400	1,113	155	132	*	*
Canada 9/	1,008	1,012	9	27	0	*
Latin American Republics	312	65	144	103	*	*
Other - 10/	40	36	2	2	0	0

1/ Excludes shipments to the noncontiguous territories of the United States.
2/ Excludes corn sugar and corn sirups.
3/ Excludes quantities shipped to Canada for storage.
4/ Including French North Africa (i.e., Algeria, French Morocco, and Tunisia) and Turkey.
5/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania, Yugoslavia, Estonia, Latvia, Lithuania, Azores, Gibraltar, Malta, Gozo and Cyprus.
6/ Excluding French North Africa.
7/ Syria, Lebanon, Iraq, Iran, Israel and Palestine, Jordan, Kuwait, Saudi-Arabia, Arabian Peninsular States n.e.s., Aden, Bahrein, Afghanistan, Ceylon, Burma, Thailand, French Indo-China, French India, British Malaya, Indonesia, Portuguese Asia, Southern and Southeastern Asia n.e.s., Hong Kong and Taiwan (Formosa).
8/ Australia, New Zealand, New Guinea, British West Pacific Islands, French Pacific Islands, Western Pacific Islands n.e.s.
9/ Including Newfoundland and Labrador.
10/ Miquelon and St. Pierre, British Honduras, British West Indies, Netherlands Antilles, French West Indies, British Guiana, French Guiana, Surinam, Falkland Islands, and Greenland.

* Less than 500 thousand pounds.

Table 11.- Exports of dairy products from the United States, by destination, fiscal year 1949-50 1/

Destination	Total	Cheese	Condensed and evaporated milk	Dried milk
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total exports	558	28	221	309
Europe - total 2/	240	24	57	159
ERP participating countries - total	200	24	57	119
Austria	4	0	0	4
Belgium and Luxembourg	17	1	16	*
Denmark	0	0	0	0
France and French North Africa	3	*	*	3
Germany	68	0	2	66
Greece	61	2	39	20
Iceland	0	0	0	0
Ireland	*	0	*	0
Italy and Trieste	26	*	*	26
Netherlands	*	0	*	0
Norway	0	0	0	0
Portugal	*	0	0	*
Sweden	0	0	0	0
Switzerland	*	0	*	*
Turkey	0	0	0	0
United Kingdom	21	21	0	*
Other European countries - total	40	*	*	40
Spain	*	0	0	*
U.S.S.R.	0	0	0	0
Other 3/	40	*	*	40
Africa - total 4/	5	*	1	4
Asia - total	191	*	109	82
China	1	0	0	1
India	3	0	0	3
Pakistan	2	0	0	2
Japan, Korea and Ryukyu	44	*	1	43
Philippine Republic	105	*	98	7
Other 5/	36	*	10	26
Oceania - total 6/	*	*	*	*
Western Hemisphere - total	122	4	54	64
Canada 7/	*	*	*	*
Latin American Republics	115	2	50	63
Other 8/	7	2	4	1

1/ Excludes shipments to the noncontiguous territories of the United States.
2/ Including French North Africa (i.e., Algeria, French Morocco, and Tunisia) and Turkey.
3/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania, Yugoslavia, Estonia, Latvia, Lithuania, Azores, Gibraltar, Malta, Gozo and Cyprus.
4/ Excluding French North Africa.
5/ Syria, Lebanon, Iraq, Iran, Israel and Palestine, Jordan, Kuwait, Saudi-Arabia, Arabian Peninsular States n.e.s., Aden, Bahrein, Afghanistan, Ceylon, Burma, Thailand, French Indo-China, French India, British Malaya, Indonesia, Portuguese Asia, Southern and Southeastern Asia n.e.s., Hong Kong and Taiwan (Formosa).
6/ Australia, New Zealand, New Guinea, British West Pacific Islands, French Pacific Islands, Western Pacific Islands n.e.s.
7/ Including Newfoundland and Labrador.
8/ Miquelon and St. Pierre, British Honduras, British West Indies, Netherlands Antilles, French West Indies, British Guiana, French Guiana, Surinam, Falkland Islands, and Greenland.

* Less than 500 thousand pounds.

Table 12.- Exports of other foods from the United States, by destination, fiscal year 1949-50 1/

Destination	Total other foods	Potatoes and sweet potatoes	Dry beans and peas	Beet, cane and maple sugar (refined)	Eggs (shell equiv.)	Fruits, total	Vegetables, total	Peanuts 2/	Soybeans 2/	Miscellaneous 3/
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total exports	4,480	704	146	53	210	1,336	525	224	1,022	260
Europe - total 4/	1,848	413	13	26	176	454	8	205	494	59
ERP participating countries - total	1,645	211	13	26	176	453	8	205	494	59
Austria	82	0	0	*	1	*	0	81	0	*
Belgium and Luxembourg	190	11	*	*	2	106	4	*	41	26
Denmark	152	0	0	0	*	1	*	*	151	*
France and French North Africa	30	0	1	1	1	2	*	25	*	*
Germany	457	106	*	12	20	96	*	41	182	*
Greece	44	23	7	8	*	*	1	0	0	5
Iceland	5	5	*	0	*	*	0	0	*	*
Ireland	12	0	*	*	0	2	*	0	0	10
Italy and Trieste	55	0	*	5	2	11	*	35	1	1
Netherlands	113	0	0	0	*	41	*	0	71	1
Norway	49	0	0	*	0	2	*	7	40	*
Portugal	67	66	0	*	*	1	*	0	0	*
Sweden	29	*	*	0	0	29	*	*	0	*
Switzerland	63	0	3	*	3	27	2	16	8	4
Turkey	*	0	0	0	0	*	*	0	*	*
United Kingdom	297	0	2	*	147	135	1	0	*	12
Other European countries - total	203	202	*	*	*	1	*	*	0	*
Spain	202	202	0	*	*	*	0	0	0	0
U.S.S.R.	0	0	0	0	0	0	0	0	0	0
Other 5/	1	0	*	*	*	1	*	*	0	*
Africa - total 6/	16	4	*	2	*	1	1	*	*	8
Asia - total	777	61	61	13	8	123	33	3	354	121
China	*	0	0	0	*	*	*	0	0	*
India	4	0	*	0	*	*	0	0	0	4
Pakistan	*	0	0	0	0	*	*	0	0	*
Japan, Korea and Ryukyu	414	*	59	10	2	2	3	*	336	2
Philippine Republic	195	18	2	*	3	47	23	*	7	95
Other 7/	164	43	*	3	3	74	7	3	11	20
Oceania - total 8/	3	*	*	1	*	*	*	*	0	2
Western Hemisphere - total	1,836	226	72	11	26	758	483	16	174	70
Canada 9/	1,249	88	7	*	1	570	372	16	174	21
Latin American Republics	552	133	63	8	24	178	103	*	*	43
Other 10/	35	5	2	3	1	10	8	*	*	6

1/ Excluding shipments to the noncontiguous territories of the United States.
2/ Excluding oil; soybeans include the bean equivalent of soya flour and meal.
3/ Includes meat offals, horsemeat, poultry, fish, corn and grape sugar, sirups, honey, tree nuts, coffee, tea, cocoa, and fluid milk and cream.
4/ Including French North Africa (i.e., Algeria, French Morocco, and Tunisia) and Turkey.
5/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania, Yugoslavia, Estonia, Latvia, Lithuania, Azores, Gibraltar, Malta, Gozo and Cyprus.
6/ Excluding French North Africa.
7/ Syria, Lebanon, Iraq, Iran, Israel and Palestine, Jordan, Kuwait, Saudi-Arabia, Arabian Peninsular States n.e.s., Aden, Bahrein, Afghanistan, Ceylon, Burma, Thailand, French Indo-China, French India, British Malaya, Indonesia, Portuguese Asia, Southern and Southeastern Asia n.e.s., Hong Kong and Taiwan (Formosa).
8/ Australia, New Zealand, New Guinea, British West Pacific Islands, French Pacific Islands, Western Pacific Islands n.e.s.
9/ Including Newfoundland and Labrador.
10/ Miquelon and St. Pierre, British Honduras, British West Indies, Netherlands Antilles, French West Indies, British Guiana, French Guiana, Surinam, Falkland Islands, and Greenland.

* Less than 500 thousand pounds.

REVIEW OF CEREAL FOOD ENRICHMENT IN THE UNITED STATES, 1948 to 1950 1/

A survey last spring of the use of synthetic niacin, thiamine, riboflavin and iron in the enrichment of cereal products indicated again the importance of the enrichment program in supplying these ingredients for civilian consumption. The total quantities of these ingredients used for enrichment in 1948-1949 and forecast for 1950 are given in table 14. Most of them went into cereal food production for civilian use. From these data and the information in table 4, page 5, it appears that 10 to 25 percent of the per capita supplies of niacin, thiamine, riboflavin, and iron are derived from the synthetic enrichment of cereal food products.

The enrichment of all commercially baked white bread and rolls was required under War Food Order No. 1 from January 1943 until October 24, 1946. In addition, a substantial proportion of white flour sold for home use was enriched voluntarily. On the basis of trade and Government data, it was estimated that about 65 percent of the white flour sold to civilians as flour or in products was enriched during the period of the compulsory program.

Because of the lack of information on the extent of enrichment after 1946, the Bureaus of Agricultural Economics, Human Nutrition and Home Economics, and Census cooperated in planning and making a survey late in 1948. The results of this pilot study were published in The National Food Situation, July-September 1949 issue. Information was collected from 17 firms manufacturing and/or selling enrichment premixes and wafers (used for bread enrichment). These firms probably account for more than 95 percent of the ingredients used for such purposes. They include two large flour millers who prepare their own enrichment mixes, manufacturers of enrichment premixes for flour, manufacturers of enrichment premixes for sale to bakeries and restaurants (other than wafers) and the firms selling enrichment wafers directly to bakeries and restaurants, mostly yeast companies. In order to verify the 1948 survey and to obtain more current data, the survey was made again this spring.

Some of the ingredients indicated in table 14 were used in enriching flour for export and for military use as well as cereal products for domestic consumption. Exports of flour were much smaller in 1949 than in the three preceding years, and a smaller proportion was enriched. Preliminary indications of total export and military takings of flour and of enriched flour are given in table 13. This table also contains estimates of total white flour production 1946-49 (made by the Bureau of Agricultural Economics, using revised estimates of commercial flour production prepared by the Bureau of the Census and the Bureau of Agricultural Economics) and the residual supplies of white flour for civilian use. These data, combined with the information in table 14 on the total amount of enrichment ingredients, lead to the conclusion that after allowance is made for the use of synthetic vitamins and iron in enriching noncivilian flour, about 65 percent of civilian white flour was synthetically enriched either as family flour, as commercial flour, or as commercially baked white bread and rolls.

1/ Prepared under the Research and Marketing Act project, "Improvements in Food Consumption Data and Analyses".

Table 13.- Production of white flour (revised); preliminary indications of noncivilian takings, total and enriched; and residual supply of white flour for civilian use, 1946-49
(million hundredweight)

Year	Revised estimate of white flour production 1/	Preliminary indications of noncivilian takings of white flour		Residual supply of white flour for civilian use
		Total	Enriched	
1946	258	58	31	200
1947	287	105	43	182
1948	263	77	36	186
1949	217	32	5	185

1/ Wheat flour ground from U. S wheat, excluding milled-in-bond, semolina-durum flour, as well as small quantities of whole wheat and farina.

In response to many requests for information, considerable effort has been devoted to the study of the extent of enrichment of white bread and rolls. The inadequacies of the data prevent a definitive answer even for 1947, the year covered by the Census of Manufactures. However, Census data on white bread and roll production inbakeries have expanded to cover all bakeries and chain restaurants (with the assistance of specialists in the Census Bureau), and then converted to white flour equivalent. The resulting total is about 75 million hundredweight of white flour, which is only a rough approximation.

Some of the enrichment wafers are sold to institutions, restaurants, and hotels doing their own baking of bread and rolls, amounting to 4.4 percent of total sales of wafers in 1949, according to the survey. If about the same proportion went to institutional users in 1947, this would leave 95.6 percent for sale to bakers. This amount of wafers appears to have been sufficient to enrich about 80 percent of the commercially baked white bread and rolls in 1947. (Total sales of 62.5 million wafers were reported for 1947. See table 6, page 19 of July-September 1949, The National Food Situation.) It seems likely that about the same proportion was enriched in the following two years.

Roughly one-fifth of the civilian supply of white flour in 1947 appears to have gone into items which are not ordinarily enriched. These include biscuits, pretzels, crackers, sweet goods, dark and specialty breads and rolls.

The use of white flour in homes in1947 has been variously estimated by Government and trade specialists at 65 to 70 million hundredweight (excluding farina). It is difficult to determine exactly how much of this was enriched with synthetic vitamins and iron. For 1947 the Bureau of the Census can make available only for riboflavin the breakdown in use of enrichment ingredients (other than enrichment wafers) for flour and for other cereal food products. After subtracting out the estimated quantities used for noncivilian flour, the residual supply of riboflavin appears to have been used by mills to enrich 80 to 87 percent of all family flour.

To summarize, the 65 percent of civilian white flour which was enriched in 1947 included (1) about 80 percent of the flour used in commercially baked white bread and rolls, (2) 80 to 87 percent of family flour, and (3) some bread and rolls baked in individual restaurants and hotels. It excluded the use of white flour in items not subject to enrichment as well as the unenriched bread, rolls and family flour. As of July 1, 1950, 26 States with a total population of 84 million (56 percent of U. S. total) required the enrichment of white bread, rolls, and flour.

Table 14.- Use of synthetic vitamins and iron in the enrichment of cereal products, 1948-1950

Use and kind	Unit	1948 revised	1949	1950 forecast
1. Use in mixes for commercial or family flour or bread and in pre-mixes for cereal food products other than bread and flour:				
a. Total (excluding wafers for bread)				
Niacin	kilograms	138,525	107,378	109,925
Thiamine	kilograms	19,539	15,286	15,688
Riboflavin	kilograms	11,754	9,055	9,230
Iron	kilograms	123,484	95,350	94,567
b. Use in mixes for commercial or family flour or bread:				
Niacin	kilograms	128,879	95,576	96,326
Thiamine	kilograms	17,873	13,279	13,365
Riboflavin	kilograms	11,046	8,165	8,201
Iron	kilograms	116,012	86,235	84,700
c. Use in pre-mixes for cereal food products other than bread and flour:				
Niacin	kilograms	9,646	11,802	13,599
Thiamine	kilograms	1,666	2,007	2,323
Riboflavin	kilograms	708	890	1,029
Iron	kilograms	7,472	9,115	9,867
2. Enrichment wafers sold directly to bakeries and institutions:				
a. Total (per 100 pound flour)	No. of wafers	61,424,430	60,992,470	63,119,000
b. High potency riboflavin (per 100 pound flour)	No. of wafers	24,240,875	23,327,000	24,028,000
c. Low potency riboflavin (per 100 pound flour)	No. of wafers	37,183,555	37,665,470	39,091,000
3. Percent of enrichment wafers sold directly to bakers	Percent	n.a.	95.6	n.a.
4. Content of enrichment wafers (calculated)				
Niacin	kilograms	73,709	73,191	75,743
Thiamine	kilograms	11,671	11,589	11,993
Riboflavin	kilograms	4,785	4,736	4,899
Iron	kilograms	55,282	54,893	56,807
5. Total use of enrichment ingredients in bread, flour, and cereal products 1/				
Niacin	kilograms	212,234	180,569	185,668
Thiamine	kilograms	31,210	26,875	27,681
Riboflavin	kilograms	16,539	13,791	14,129
Iron	kilograms	178,766	150,243	151,374

1/ Civilian and noncivilian use; sum of quantities in sections 1a and 4.

Table 15.- Production of major food commodities, calendar years, 1935-39 average, 1941, 1948, 1949 and estimates for 1950 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1941	1948	1949	1950 Prel. 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Meats (carcass weight)								
Beef	Mil.lb	6,937	8,082	9,079	9,448	9,580	138	101
Veal	do	1,038	1,036	1,412	1,322	1,293	125	98
Lamb and mutton	do	870	923	750	607	608	70	100
Pork (excluding lard)	do	7,337	9,528	10,205	10,333	10,939	149	106
Total meats	do	16,182	19,569	21,446	21,710	22,420	139	103
Fish (edible weight)								
Fresh and frozen	do	615	757	760	3/	3/	--	--
Canned 4/	do	337	470	485	3/	3/	--	--
Cured	do	74	71	63	3/	3/	--	--
Total fish	do	1,026	1,298	1,308	3/	3/	--	--
Poultry and eggs								
Eggs	Mil.doz	3,335	3,839	5,056	5,168	5,500	165	106
Chicken (dr. wt.)	Mil.lb	2,327	2,789	3,284	3,857	3,980	171	103
Turkey (dr. wt.)	do	350	465	505	699	740	211	106
Dairy products								
Total milk 5/	do	106,450	118,094	118,353	121,962	123,326	116	101
Cheese 6/	do	669	956	1,094	1,193	1,190	178	100
Cond. and evap. milk	do	2,225	3,555	3,778	3,154	3,245	146	103
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	2,268	1,509	1,692	1,675	77	99
Lard 7/	do	1,630	2,228	2,356	2,552	2,700	166	106
Margarine (fat content)	do	303	297	735	701	764	252	109
Shortening	do	1,529	1,409	1,441	1,483	1,625	106	110
Other edible fats and oils 8/	do	575	1,020	1,281	1,889	1,780	310	94
Total fats and oils 9/	do	6,207	7,222	7,322	8,317	8,544	138	103
Fruits								
Fresh:								
Citrus	do	6,875	8,167	8,681	7,677	6,796	99	89
Apples (commercial)	do	4,385	4,143	3,275	4,113	4,000	91	97
Other (excl. melons)	do	4,703	5,373	4,530	5,070	4,300	91	85
Processed:								
Canned fruit	do	1,705	2,318	2,511	2,582	2,400	141	93
Canned fruit juices	do	333	993	2,513	2,127	1,900	571	89
Frozen	do	106	208	402	483	660	623	137
Dried	do	1,118	904	918	980	738	66	75

- Continued

Table 15. - Production of major food commodities, calendar years, 1935-39 average, 1941, 1948, 1949 and estimates for 1950 with percentage comparisons 1/ - continued

Commodity	Unit	Average 1935-39	1941	1948	1949	1950 Prel. 2/	1950 as a percentage of 1935-39	1950 as a percentage of 1949
Vegetables								
Fresh 10/	Mil.lb.	30,520	32,228	38,511	37,396	39,748	130	106
Canned 11/	do	4,030	5,770	5,824	6,062	5,909	146	97
Frozen	do	12/ 78	107	446	564	600	769	106
Potatoes	Mil.bu.	355	356	455	402	420	118	104
Sweetpotatoes	do	68	63	50	54	60	88	111
Dry edible beans 13/	Mil.lb.	1,360	1,710	1,954	2,022	1,486	109	73
Dry field peas 13/	do	229	346	326	297	350	153	118
Canned baby foods	do	48	126	526	511	525	1,094	103
Sugar, raw basis	1,000 sh.tons	1,948	2,090	1,917	2,112	2,447	126	116
Grains								
Wheat	Mil.bu.	759	942	1,314	1,146	1,010	133	88
Rye	do	44.9	43.9	26.4	18.7	22.5	50	120
Rice, milled	Mil.lb.	1,340	1,541	2,290	2,503	2,607	195	104
Corn, grain only	Mil.bu.	2,050	2,414	3,402	3,109	2,785	136	90
Oats	do	1,045	1,183	1,493	1,323	1,484	142	112
Barley	do	239	363	316	238	300	126	126
Peanuts, farmers' stock basis	Mil.lb.	1,229	1,475	2,338	1,876	1,677	136	89

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Preliminary estimates based on trends in livestock numbers, current or prospective rates of output, average or probable acreages and yields, and such other data or advance estimates as are available. These estimates are only used to indicate the general level of food supplies for domestic consumption for 1950, but they are based on such official estimates of production as are available at this time. Revisions will of course be made from time to time throughout the year as official indications or estimates are issued through the Crop Reporting Service of the Department. 3/ Not available. 4/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 5/ Includes total farm production of milk and off-farm production. 6/ Excluding full skim, cottage, pot and bakers' cheese. 7/ Including amount used in manufactured food and nonfood products. 8/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 16.- Retail food prices and total consumer price index, United States, 1940-47 and 1948-50 by months
(Index numbers 1935-39=100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949	233	201	187	148	170	219	153	227	176	221	202	169
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170
July	236	204	182	141	170	221	154	228	176	208	202	168
Aug.	240	222	185	144	169	211	150	230	176	209	203	169
Sept.	244	233	185	148	170	209	148	230	177	211	204	170
Oct.	235	228	187	144	169	202	147	228	178	214	201	168
Nov.	229	208	186	140	169	213	146	225	179	265	201	169
Dec.	223	178	186	137	169	208	145	224	179	292	197	168
1950												
Jan.	219	152	184	135	169	217	143	224	179	300	196	167
Feb.	222	141	184	134	169	210	143	222	178	304	195	166
March	227	150	182	134	169	205	143	222	177	312	196	167
April	228	150	179	135	169	212	143	223	175	308	197	167
May	240	144	178	137	170	220	143	225	175	299	200	169
June	247	149	177	140	170	233	143	225	174	296	205	170
July	256	164	180	141	171	238	143	225	176	304	210	172
Aug.	258	183	183	159	176	203	146	228	188	329	209	173

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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